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# SELECTION AND REFERRAL TO TRAINING




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## A WORKING GUIDE FOR COUNSELLORS



Employment and  
Immigration Canada

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# SELECTION AND REFERRAL TO TRAINING

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Occupational and Career  
Analysis and Development Branch

In Co-Operation with  
the Training Branch

## A WORKING GUIDE FOR COUNSELLORS

1982

### CAUTION

This text is in conformity with policies which are in effect as of June 1, 1982. However, because policy changes will continue to be made, the reader is advised to check for revisions with the CEIC regional or national headquarters representative of the Training Branch.

Disponible en français sous le titre "Sélection et inscription en vue de la formation — Guide du conseiller en emploi".



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## ACKNOWLEDGEMENTS

At its meeting of November 7, 1979, the Canada Employment and Immigration Commission requested the Acting Executive Director, Employment and Insurance, in consultation with the Executive Director, Labour Market Development, to develop a policy for the referral of clients to the Canada Manpower Training Program courses. As an operations adjunct to this policy, the *Selection and Referral to Training — A Working Guide for Counsellors* has been prepared by M. Catherine Casserly of the Advanced Development Division, Occupational and Career Analysis and Development Branch, Employment and Insurance in co-operation with the Institutional Training Branch, Labour Market Development. It is based on input received in extensive consultation with counsellors, CEC managers, and counselling and training specialists from British Columbia, Ontario, Quebec and Nova Scotia.

Ottawa, 1982





# Introduction

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## A – Purpose of the Working Guide for Counsellors

The report on the Task Force “Labour Market Development in the 1980’s” reported that many of the new jobs which will emerge in the 1980’s will require skilled and highly qualified workers not now being produced in Canada in adequate numbers. Moreover, the decline in the number of youth entering the labour force means that more emphasis will have to be put on the retraining and upgrading of mature workers to provide highly skilled trades people for industry in order to head off impending shortages of some types of skilled workers.

CEC counsellors will be most involved in this new emphasis, and this book is designed to help them in this task. It serves two different audiences. The first is that of new counsellors who need in-depth training in how to do effective selection and referral to training. The second is that of experienced counsellors who need an easy reference text, especially one that incorporates the revised policy on selection and referral. The new counsellor should study each chapter and then attempt to make decisions about authorizing training based on cases supplied by more experienced counsellors in their own CEC’s. If they have any difficulty, they can then review their samples against those already completed as well as discuss them with their own supervisors. More experienced counsellors should read the complete text in order to update their knowledge in this area. When they have questions, they can then make use of the table of contents to look up specific points. If, at any time, counsellors run into any problems dealing with selection and referral, the counselling and training specialists in their own regions are available to provide further assistance.

Counsellors should remember that the selection and referral of clients to training is not a separate program or technique. Rather it is one solution of many which are available and to do it properly calls on the counsellor’s skills and expertise. The counsellor is the synthesizer who chooses from among all CEIC programs those that are best for each particular client in each particular situation.

## B – Objectives of the Canada Employment and Immigration Commission

The rationale for training is to help to achieve the CEIC goal of a balanced labour market, where the jobs available are equal not only to the number of workers available but also to the kinds of trained workers that are available. The job of the counsellor is to assist in the matching process. If the matching would be facilitated by improving the qualifications of the worker, then the counsellor may encourage training. This has been more formally stated in the CEIC objectives for Employment and Insurance which read as follows:

## Objective

To further the attainment of national economic and social goals by realizing the full productive potential of Canada's human resources, while supporting the initiatives of individuals to pursue their economic needs, and, more generally, their self-fulfillment through work.

## Sub-Objectives

- to facilitate the process whereby employers secure suitably qualified labour and individuals obtain employment to which they can realistically aspire;
- to offer temporary income support to unemployed workers while they find new jobs;
- to assist the unemployed in becoming re-absorbed into the labour force as quickly as possible;
- to assist the handicapped and other disadvantaged persons to improve their position in the labour market;
- to generally improve the functioning of the labour market and reduce cyclical, seasonal, structural and frictional unemployment;
- to assist individuals in making decisions with respect to personal development in the world of work;
- to assist employers to make effective use of labour resources under evolving economic and social conditions;
- to assist individuals to acquire, through training, the skills and knowledge in demand in the Canadian labour market;
- to promote the productive use of human resources not currently employed by the economy.

## C – CEIC Organization

Often times, counsellors receive directives from National headquarters (NHQ) and have little idea how the pieces fit together. Figure 1 outlines the current organizational structure of CEIC.

At the national headquarters level, the groups having an impact on a counsellor's work in the area of selection and referral to training would be:

### 1. Benefit Programs

This group develops policies on the Unemployment Insurance benefits to be paid to clients.



## **2. Labour Market Development**

This group develops the national policies and programs on training, on allowances and on the development of programs to increase the number of jobs available especially through government stimulation and intervention. This group includes the Training Branch.

## **3. Employment and Insurance**

This group focuses on the operations of the CEC's as they carry out their responsibilities directly related to both employer and employee clients. Occupational and Career Analysis and Development Branch (OCAD) is part of this group.

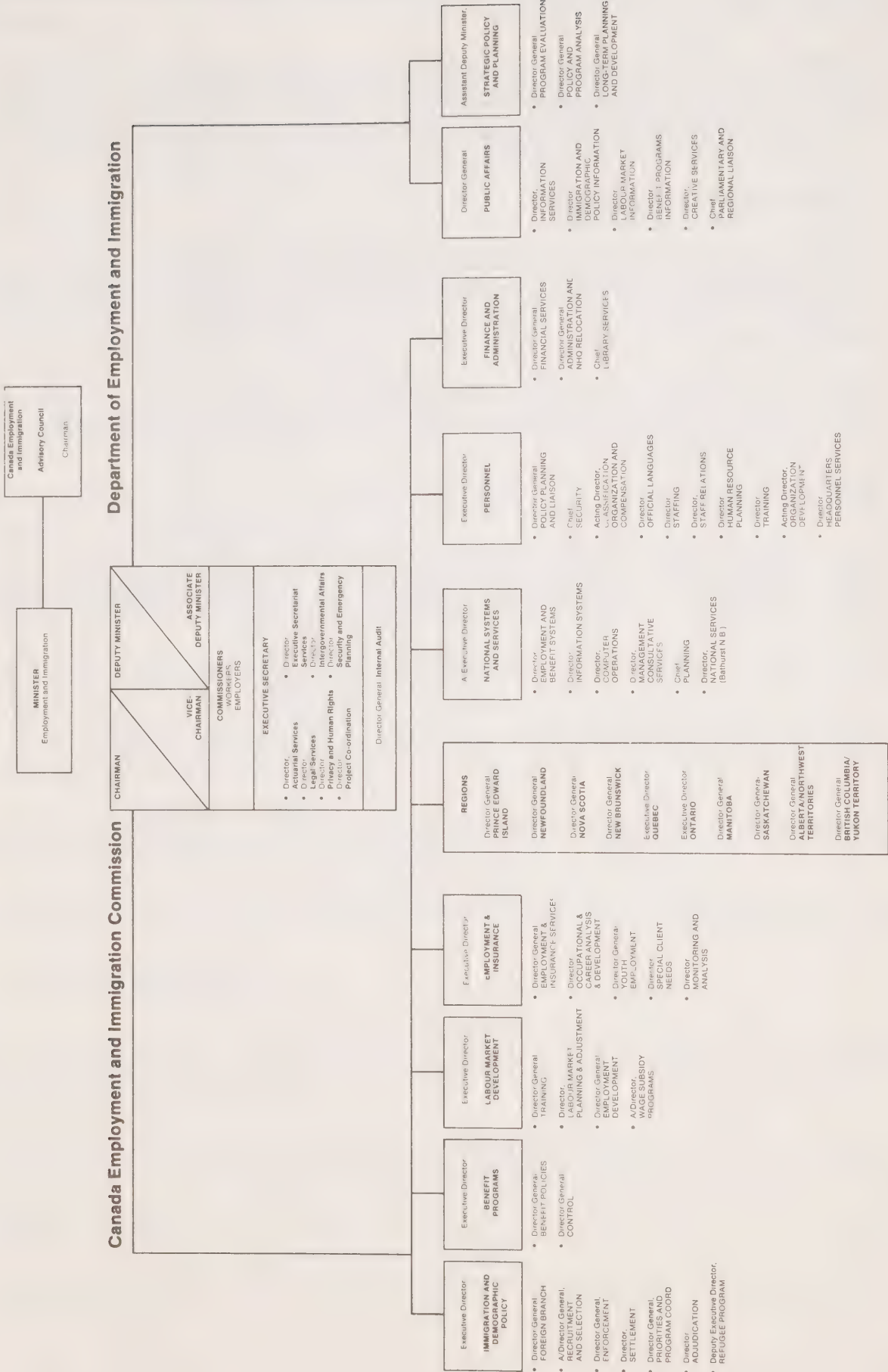
At the regional level, there is generally a similar but simpler type of organization so that counsellors will be in contact with members from the regional training and counselling branches.

## **D – Summary**

This chapter defines the purpose of the guidebook which is to assist counsellors in doing effective selection and referral to training. The objective of the CEIC and its organization are outlined.

Figure 1: Organization Chart of Canada Employment and Immigration Commission

EMPLOYMENT AND IMMIGRATION CANADA





# Legislation and Guidelines for Selection and Referral to Training

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The counsellor's decision making in the selection and referral process is guided by six main sources. A thorough knowledge is essential if the program is to be administered equitably and fairly across the country.

These sources are:

- Adult Occupational Training Act
- Unemployment Insurance Act
- The Employment Manual
- Federal-Provincial/Territorial Agreements on Training for each Region
- Policy Guidelines on Trainee Selection and Referral
- Policy on Employment Counselling

## **A – The Adult Occupational Training Act (AOTA) and Regulations and Amendments**

The Act was first passed in 1966–67 and allows for the training of adults in Canada. It has been amended a number of times since. The most frequent change has been in the schedule of allowances, and counsellors should ensure that they have the latest figures when determining the income support which is to be provided to the client.

## **B – Unemployment Insurance Act**

Section 39 of the Unemployment Insurance Act deals with training. Certain changes in the UI Act were introduced on January 1, 1979 and other amendments are made as necessary. An official summary of the section states:

1. While on course, a claimant being sponsored by CEIC is considered unemployed and available for work.
2. If a benefit period would end during the period of the training course, it can be extended up to six weeks after the claimant completes the course or leaves the program with cause.
3. Benefits can be paid for the extended benefit period following the course.
4. The rate of weekly benefit for clients on course cannot exceed the greater of the rates given in the benefits schedule of the Adult Occupational Training Act or Section 24 of the U.I. Act.

5. The benefit period cannot exceed 104 weeks even if the claimant is on a training course:
6. A client can earn an amount equivalent to as much as 25% of the benefits being received from U.I. Any amount greater than this 25% is deducted from the benefits being received at the rate of \$1.00 deducted for every \$1.00 earned.
7. Training allowances in excess of the allowable U.I. benefits are deducted at a rate of 100%.
8. No amount can be received in benefits each year which is greater than that authorized by law.

These chapters provide the ultimate guidelines on the correct interpretation and application of the AOT Act. Revisions are part of an ongoing process and counsellors should be aware that amendments are issued at periodic intervals.

## **C – The Employment Manual**

A primary resource document for counsellors is the Employment Manual. It is intended to aid counsellors in understanding and applying employment and insurance policies. The six most important chapters related to the selection and referral of clients to training are:

Chapter 18: Training Provided under the Adult Occupational Training Act

Chapter 21: Canada Manpower Training Program: Trainee Selection and Referral Process

Chapter 23: Canada Manpower Training Program: Institutional Training — criteria, types of training and policy

Chapter 24: Canada Manpower Training Program: Documentation System  
This is a new chapter which replaces old Chapter 25 parts I to IV

Chapter 25: Canada Manpower Training Program: Forms and Reporting Procedures for Institutional Training

Chapter 29: Canada Manpower Training Program: Income Support for Trainees

## **D – Federal-Provincial/Territorial Agreements on Training — A Definition**

The CEIC enters into agreements with each of the provinces and territories which concern specific regional agreements on training. These 12 agreements are reviewed and renewed at various times, usually at three year intervals. Each follows the same general outline of:

- a) Statement of general definition based on the AOT Act and of basic principles;
- b) Agreements on Institutional Training;
- c) Agreement on the functions and duties of the Joint Manpower Needs Committee;
- d) Employer Centered Training.

Included in it are the general agreements on amount of money to be spent or allocated and dates for renewal and/or revisions to the existing contract. Great stress is placed on mutual co-operation and agreement after discussion.

## **E – Policy on Trainee Selection and Referral Process**

These guidelines have been prepared by the Training Branch at National Headquarters and approved by the Commission on March 24, 1981.

### **Introduction**

The following guidelines on trainee selection and referral process are intended to provide a better understanding of the requirements of the Adult Occupational Training (AOT) Act and Commission policy. The guideline will include information on what should be done regarding selection including assessment, and the referral process. They should be useful in reaching objective decisions and in dealing fairly with clients' requests for training.

### **Definition of Terms**

In order to facilitate uniform interpretation in the context of this document, the main terms used in relation to trainee selection and referral to CMTP courses have been defined as follows:

- Assessment:** The element of the selection process which consists of a thorough evaluation of the client's situation in relation to training and employment opportunities.
- Selection:** Process by which the employment counsellor and the client reach a decision that an occupational training course is suitable and will result in increased earning capacity or employment opportunities for the client.



- Referral:** The act by which an employment counsellor directs a client to training. This act consists in informing the training unit or training CEC or CMTP co-ordinator, depending on the organizational structure in the region, that a client has been selected for training and that the client's name is to be assigned a training space or added to the list of selected clients.
- Wait List:** The list of clients who have been selected and referred to training but who cannot be enrolled immediately because no training space is available.
- Documentation:** The completion of documents and forms to authorize the training and the appropriate income support measures as explained in EA 24 and EA 29.

## Legal Provision

Section 4(1) of the Adult Occupational Training (AOT) Act stipulates who has the responsibility for trainee selection and referral to training and what should be the basis of the decision. That section reads as follows:

*“Where an adult who, at any time since attaining the regular school leaving age in the province in which he resides, has not attended school on a regular basis for any period of at least twelve months informs an employment officer that he wishes to undertake occupational training, the employment officer may, subject to subsection (2), arrange for the enrolment of that adult in any occupational training course that will, in the opinion of the employment officer, provide training suitable for that adult and increase his earning capacity or his opportunities for employment.”*

Thus, referral to training is clearly the responsibility of the employment officer i.e. employment counsellor who has to ensure that the training is suitable for the client and is likely to result in increased earning capacity or opportunities for employment. However, it should be noted that the referral of apprentices, as indicated in Section 5(2) of the AOT Act, does not have to be arranged by an employment counsellor.

It is on this basis that the following guidelines for the trainee selection and referral process are developed.

## Request for Training

When a client at the suggestion of the employment counsellor, an outreach worker, community agency or on his/her own initiative, expresses a wish to undertake a training course the employment counsellor must determine with the client whether or not a specific course is suitable for him/her.

## Selection Process

The selection process consists of the activities required to enable an employment counsellor to decide whether or not a client should be referred to training. As indicated in Section 4(1) of the Adult Occupational Training (AOT) Act, the employment counsellor must determine if the training is suitable for the client and if it is likely to result in increased earning capacity or opportunities for employment.

## Assessment

In order to determine the suitability of the training, the employment counsellor will obtain information in respect to the following areas that may affect the possibility of a client successfully completing the training and of finding employment in a course-related occupation.

- a) Client's background: educational qualifications, social and economic factors, work experience and job skills.
- b) Client's attitudes, aptitudes, and interests with respect to training and employment.
- c) Course prerequisites, occupational and job requirements.
- d) Employment opportunities in the local, regional and national labour market.
- e) Client's mobility for training and employment.

This information may be obtained either from the client and/or from schools, training institutions and community agencies where the client is already known. In accordance with regional policies and procedures, assistance may also be obtained from training institutions and community agencies in the assessment process in areas such as testing or diagnostic services.

## Guidelines

1. Employment counsellors should utilize CEIC testing and other diagnostic services whenever it is deemed necessary to reach an informed decision. To avoid duplication, efforts should be made to obtain test results from other agencies when such tests have been already administered.
2. Employment counsellors should determine whether clients meet AOT criteria, CMTP criteria, course prerequisites or job requirements. In this respect, training institutions may be asked to assist in determining whether or not clients meet the course prerequisites. Training institutions do not refer clients to specific training courses.

3. Based on information obtained in relation to a), b), c), d) and e) above, employment counsellors should determine with the client (i) whether the referral to training will increase the client's earning capacity or opportunities for employment and (ii) that the client has a reasonable chance to complete the training successfully (training in this context means a course or series of courses leading towards the occupational goal).
4. Employment counsellors should fully inform clients about the implications of their occupational choice. For instance, clients should know what to expect in terms of employment opportunities, wage rates, unions and work conditions.
5. Employment counsellors should inform clients on the implications of being enrolled in a CMTP course such as what is expected from them, available income support during training, etc.

## Referral Process

### Referral to Training

The employment counsellor will select and refer a client to training when the employment counsellor is of the opinion that a given training course or series of courses will:

- a) benefit the client by enabling him/her to achieve an occupational goal compatible with his/her potential; and
- b) increase the client's earning capacity or opportunities for employment; and
- c) meet the current or anticipated needs of the economy for skilled workers.

The responsibility to refer a client to training lies with the employment counsellor who has had direct communication with the client and who has gathered information on the client's situation.

### Guidelines:

1. The decision to refer the client to training should only be made if, in the counsellor's opinion, he/she has a reasonable chance of completing the training successfully. Thus, counsellors should not grant all requests for training nor should they refer only low risk clients.
2. When referring a client to a skill course, the employment counsellor should be satisfied that the occupational goal is consistent with the client's interests, aptitudes and attitudes.
3. When referring clients to BTSD courses, there should be an occupational goal in order to determine the level of BTSD required as prerequisite for the skill course. When BTSD is required to meet job requirements, the level of BTSD should be clearly related to those requirements.



4. Clients referred to Job Readiness Training are not likely to have clearly identified occupational goals. The clients should expect to take advantage of local employment opportunities available following training for which they are qualified.
5. Plans for clients enrolled in BTSD and Job Readiness Training should be flexible enough to allow for modifications dictated by changes in clients' interests and perception of aptitudes or by the needs of the labour market. Such changes should take place only after a reassessment of the client's situation by the counsellor.
6. Clients selected for training must be placed in specific training courses on a first-referred, first-enrolled basis. The only exception to this will be when the CEIC has given specific direction to accord priority to specific target groups.
7. Counsellors will record the reasons for their decision on EMP 701 (EMP 2062).
8. The employment counsellor will explain to the client the reasons for not selecting him/her for training and he/she should be allowed the opportunity to comment on the employment counsellor's decision.

## Wait List

The wait list includes the names of clients who have been assessed and referred to training, but who are not enrolled in a training course because there were a greater number of suitable candidates than training places. The purpose of wait-listing is to ensure that the clients accepted for training may have access to the training on a first-come, first-served basis.

### Guidelines:

1. When a training space is unavailable, the client should be advised of the implications of being on a wait list and his/her name should be placed on such a list if it is his/her wish.
2. For a client whose training plan to reach his/her occupational goal includes referral to more than one course, the date of referral to the second course will be the same as the referral date to the first course.
3. The wait list should not be by-passed except as part of special programs and then only up to a pre-determined point before course commencement.
4. There should be frequent and periodic revision of the wait-list to eliminate the names of clients no longer interested in the course, in order to maintain an up-to-date list of prospective trainees that will reflect the actual situation as accurately as possible.
5. Whenever there are several identically dated referrals, the date training was requested by trainees may be used when setting up the wait list.

## General

### Joint Assessment Process

In most cases, employment counsellors have the necessary expertise and knowledge to assess the client's situation to determine whether or not a specific training course is suitable. However, there are courses where a joint assessment process may assist the employment counsellor in determining the suitability of the training. These courses include those for occupations where trainees must meet the requirements of provincial licensing authorities, those very expensive occupational courses (such as pilot training) to ensure that potential trainees meet employers' requirements, those courses for highly skilled occupations where detailed knowledge is necessary and Job Readiness Training courses where a good understanding of clients' problems is required.

### Assignment of Training Spaces

The procedures to assist training spaces may vary from one region to another or even within a region. However, it is important that whatever procedure is followed, training spaces will be assigned on a first-referred, first-enrolled basis, as determined by the date the decision was recorded. The only exceptions are in relation to special measures where priority can be given to target groups according to Commission policies.

### Employed Workers

It is the Commission's policy that requests for training initiated by an employed worker should receive the same consideration as requests by other workers. These requests should be assessed in relation to the basic criteria i.e. that the training should increase the client's earning capacity or employment opportunities.

### Review of Counsellor Decision

When a client does not agree with the reasons for not being selected for training, he/she should be informed that he/she may ask the manager or supervisor of the employment counsellor to review the decision. When the documentation on file is not sufficient to review the case, the manager or supervisor will ask the original counsellor to provide more information to justify the decision he/she has taken. In addition, and only if necessary, the manager or supervisor may ask another counsellor to re-assess the client's request.

### Roles

The Training Branch at National Headquarters has the responsibility to develop broad guidelines and to provide functional guidance with respect to trainee selection and referral policies.

Regional training officials have the responsibility to develop specific guidelines concerning procedures that are consistent with national guidelines. They will ensure that the trainee selection and referral process in the region is fully consistent with national policies and will promote the effectiveness of the Program. In addition, they will ensure that counsellors have access to updated course description sheets that specify course prerequisites, occupational and job requirements, and other information necessary to the trainee selection process.

The Occupational and Career Analysis and Development Branch NHQ and regional counselling units have the responsibility of developing and identifying counselling tools and techniques that will contribute to improving the effectiveness of the trainee selection process.

## **F - Employment Counselling in the CEIC - Policy\***

Employment Counselling is an important and necessary component of the employment services provided by the CEIC to assist CEC clients to achieve satisfactory placement. Through employment counselling, clients are assisted to identify and discuss their employment possibilities, establish realistic employment goals, identify solutions to employment difficulties and implement corrective action leading to integration into the labour market. Employment counselling has, at the same time, received limited explanation as to its purpose and parameters. As a result, employment counselling and its relationship with other Commission programs and services are frequently misunderstood. While recognizing fully that employment counselling staff perform many equally important duties, the focus of the policy is on clarifying the employment counselling component of these duties.

### **Policy**

#### **General Statement**

The Employment Counselling policy of the Commission is that:

*clients who require employment counselling in order to achieve satisfactory placement shall receive it and employment counselling staff shall have the necessary competencies to deliver employment counselling services.*

#### **Sub-Policies**

- a) Employment counselling services must be available through all local offices.
- b) Employment counselling is a specialized function which must be performed by staff members who possess the required capabilities.

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\* Excerpt from *Employment Counselling in the CEIC*, prepared by Employment Counselling Division, Occupational and Career Analysis and Development Branch, CEIC, Cat. No. WH-Y-045



- c) National Headquarters, in collaboration with the regions, must develop, test and implement systematic and comprehensive training required to support effective employment counselling services.
- d) National Headquarters, in collaboration with the regions, must develop, test and implement the counselling tools, interviewing techniques and counselling approaches (both individual and group) required to enable local offices to provide effective employment counselling services.
- e) Employment counselling staff are responsible for determining, with clients, their need for and willingness to receive employment counselling assistance.
- f) Employment counselling staff are responsible for selecting and using, with clients, the appropriate employment counselling tools and the appropriate CEIC programs and services needed to achieve client employment goals effectively.
- g) Employment counselling staff are responsible for limiting the extent of their interventions with clients according to their capabilities and the role of the Commission.
- h) National Headquarters, in collaboration with the regions, must develop a system for measuring and evaluating employment counselling services in order to provide managers with data on which to make informed decisions and improve the quality of services.

## G – Summary

This chapter reviews the legislative guidelines and Commission policies on areas related to training including the Adult Occupational Training Act, the Employment Manual, the Unemployment Insurance Act, the definition of Federal-Provincial/Territorial Agreements on Training and policy guidelines on Selection and Referral to training and on the Employment Counselling policy.

# Types of Training Sponsored by CEIC

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## A – Introduction

There are two basic programs of training which the CEIC sponsors. They are:

### 1. Institutional Training

- that training which is occupationally directed and conducted in an organized or formal instructional setting and which usually takes place in a classroom – hence the name – “institutional”. This training is covered by the Canada Manpower Training Program (CMTP).

### 2. Industrial Training

- that shared-cost incentive training program whose overall objective is to meet the skill needs of employers and to improve the employability and earning capacity of workers through the expansion and improvement of employer provided training. This training is covered by the Canada Manpower Industrial Training Program (CMITP).

## B – Objectives of CEIC-Sponsored Training

### 1. Objectives of the Canada Manpower Training Program

The objective of the Canada Manpower Training Program is to provide individuals with occupational skills that are likely to improve their employability or earning capacity and that are required in the Canadian labour market.

### 2. Objectives of Employer-Centered Training

Where the CEIC enters into a contract to assist an employer or association of employers to undertake a specific training program, the objectives are as follows:

- a) the support of industrial development strategies as established for the various regions of the country;
- b) the alleviation of persistent skill shortages;
- c) the prevention of lay-off of workers because of technological or other changes;
- d) the encouragement of the establishment of new, and the improvement of existing employer-centered training programs.

## **C – Institutional Training — Canada Manpower Training Program (CMTP)**

In the Employment Manual, Chapter 23 describes the institutional training which is sponsored under the Canada Manpower Training Program (CMTP).

Institutional training is designed to bring clients up to the level which gives them a better chance on the labour market. Usually it is used for clients whose existing qualifications for labour market entry are not adequate.

### **1. General Training**

#### **a) Language Training**

Language training in English and/or French can be given to three types of clients who are experiencing difficulty in getting a suitable job because of insufficient knowledge of the required language of work.

- **Immigrant Workers**

If an immigrant cannot be placed in his/her own or a related occupation because of a language difficulty and any other placement would create a hardship or adversely affect his/her social attitude and assimilation, he/she should be referred to full-time language training.

- **Canadian Migrants**

If a Canadian migrates to parts of Canada where he/she is not fluent in the official language of work which prevails and as a result cannot be placed in employment, then he/she can receive language training.

- **Native Canadians**

Language training can be provided to Natives, in the official language of the majority in their province of residence, when they are not fluent in either official language, whether or not they move from one province to another.

#### **b) Work Adjustment Training (WAT)**

This program is designed for clients who encounter serious problems in getting and keeping employment because they have poor work habits and lack vocational goals. Many also lack basic education or specific job skills.

Work Adjustment Training is intended to identify the problems of such workers and to help in providing them, through counselling and participation in work activities, with the knowledge, habits and attitudes needed to hold permanent jobs. In some cases, the worker may be subsequently referred to BTSD, institutional skill training or employer-centered training to develop the necessary skills and knowledge.



**c) Job Readiness Training (JRT)**

Job Readiness Training is intended to increase the employability of chronically unemployed workers and of those persons wishing to enter or re-enter the labour force after a prolonged absence who face serious barriers to employment and who are unable to benefit from other programs. A chronically unemployed worker is considered to be a person who has been unable to find and maintain employment for more than a few weeks at a time in the previous 12 months, and a prolonged absence means a period of 2 years or more out of the labour force. It is designed to aid the trainees:

1. To develop an awareness of their own attitudes, abilities and interests;
2. To make an occupational choice;
3. To develop problem-solving skills and interpersonal relation skills;
4. To develop acceptable work behaviours and basic work skills;
5. To acquire job-seeking skills and other employment-related knowledge as required.

**d) Basic Training for Skill Development (BTSD)**

BTSD is designed to give a client the basic academic instruction which is a pre-requisite for either employment requiring a designated academic level or to a skill training course which has specific entrance requirements.

Clients begin the program based on their academic functioning level.

As of April 1, 1981, the lowest level of academic upgrading to which a client can be referred is BTSD II, which is the equivalent to grade 7. BTSD is designed to serve primarily as preparation for skill development and so, in general, clients who are being referred to BTSD have a training plan which includes subsequent skill training. However, the training policy recognizes that sometimes higher academic qualifications are required to meet job requirements and that a counsellor would be correct to refer a client to BTSD only.

An important characteristic of BTSD is the normally continuous intake-exit. This process means that as a trainee satisfactorily passes through the process checks for each terminal level of each subject of a particular course, he/she is graduated from the subject regardless of how long or short a time he/she may have been in it.

This results in a continuous flow of trainees in and out of the various BTSD courses.

### **e) Skill Training**

Skill training must be occupationally directed and conducted in an organized or formal instructional setting whether in an institution or in a designated training area of a job site.

There are 3 types of skill training:

#### **1. Entry Skills**

Knowledge needed to enter the occupation. Usually trainees will be unskilled workers or people who have to acquire new skills.

#### **2. Upgrading Skills**

Skills needed to enable the worker to perform at a higher level in his/her present occupational field.

#### **3. Updating Skills**

Skills needed to keep the worker abreast of technological change in his/her present occupation.

## **2. Apprenticeship Program**

Apprenticeship training is characterized by stated length of apprenticeship, generally consisting of from three to five years, working under the direction of a qualified tradesperson, plus related classroom instruction approved by the province or territory and generally not exceeding 10 weeks annually. Apprenticeship training consists of two parts: (1) in-school classes and (2) working on the job under the direct supervision of a journeyman. Generally, the apprentice must put in two years of reasonably continuous employment and up to 12 weeks in each year of apprenticeship for the formal technical instruction.

Unlike most other CMTP trainees, the apprentice is not placed in training by the CEC counsellor. Because of the terms of reference of his/her employment, the apprentice is considered to have made a career decision.

## **D – Industrial Training — Canada Manpower Industrial Training Program (CMITP)**

The second major training program occurs at the job site. Chapter 26 of the Employment Manual describes the regulations concerning CEIC-sponsored industrial training.

While an employer has the responsibility to train its employees, the CEIC can share its responsibility under certain conditions. The general objectives of CMITP are to meet the skill needs of employers and to improve the employability and earning capacity of workers through the expansion and improvement of employer-provided training.

There are three types of training and they can be used separately or in any combination:

### **1. Vestibule or Classroom Training**

Training which is given off-the-job in an organized instructional setting and where any production resulting from the training is incidental to the instruction itself.

### **2. Double Banking**

Training which is done in a production setting where the trainee is supernumerary to regular workers performing the function.

### **3. On-the-Job Training**

Training which an employee receives while learning to perform his/her duties during actual production.

An employer can either provide the training itself or arrange for another agency to provide it.

Table 1 outlines the kinds of CEIC sponsored training which are available.



## Table 1

### CEIC - Sponsored Training Programs

<p>I</p> <p><b>Institutional</b> (CMTP) (Usually takes place in school)</p>	<p>II</p> <p><b>Industrial</b> (CMITP) (Usually takes place on-the-job or at employer's location)</p>
<p><b>A General</b></p> <ol style="list-style-type: none"> <li>1. Language Training               <ol style="list-style-type: none"> <li>(a) Immigrants to Canada</li> <li>(b) Migrants within Canada</li> </ol> </li> <li>2. Work Adjustment Training - (WAT)</li> <li>3. Job Readiness Training - (JRT)</li> <li>4. Basic Training for Skill Development - (BTSD)</li> <li>5. Skill Training               <ol style="list-style-type: none"> <li>(a) Entry Skills</li> <li>(b) Upgrading Skills</li> <li>(c) Updating Skills</li> </ol> </li> </ol>	<p><b>B Training of Apprentices</b></p> <p>Employer-provided training for current employees or CEC clients of the following types:</p> <ol style="list-style-type: none"> <li>A) Existing employees to increase attractiveness on the labour market</li> <li>B) Special Needs Clients</li> <li>C) Unemployed</li> <li>D) "Employment threatened" clients</li> <li>E) Specific groups               <ol style="list-style-type: none"> <li>1. Supervisors and managers</li> <li>2. Aircraft pilots</li> <li>3. Trade Union personnel</li> <li>4. Professional employees in special situations</li> <li>5. Immigrants who lack Canadian experience</li> <li>6. Apprenticeable Occupations</li> </ol> </li> </ol>

## **E – General Criteria for Selection**

### **1. Universal Criterion – Improved Labour Market Position**

Section 4(1) of the Adult Occupational Training Act stipulates that a client can be selected for training if, in the opinion of the employment counsellor, the training

- a) is suitable for the client and
- b) will increase his/her earning capacity, or
- c) will increase his/her opportunities for employment.

Often, a counsellor can only conclude whether or not a client meets these essential criteria after reviewing the client's history in detail. These universal criteria must be met if a client is to be selected for training of any kind. Beyond that, the specific criteria will determine whether or not a client is suited for particular types of training.

### **2. Criteria for Institutional Training**

Each training program has certain entrance requirements. Some are general and are based on the AOT Act. Others have been developed as the basis for the job for which the training will prepare the client.

The criteria for selection are:

#### **a) Eligibility Age for Courses other than BTSD**

The client must be at least one year beyond the normal school leaving age of the province in which the client lives. This varies across the country and so the counsellor must be familiar with the special conditions existing in that province or territory.

#### **b) Established Non-School Attendance for Courses other than BTSD**

Since attaining the school leaving age, the client must establish a minimum total of twelve months period of non-attendance in the regular school system. 'School' is defined as a primary or secondary school in which there is compulsory attendance, or an educational institution identified as part of the regular school system by the Manpower Needs Committee of the Province. However, universities are not considered as part of the regular school system.

Once this is established, this non-attendance period is not forfeited by a client returning to school at a later date.

Further, the twelve-month period is valid if

- (i) the client attended school for less than twenty days during that period, or
- (ii) the client was on a CMTP course, or
- (iii) the client held a full time job while attending school outside working hours.

*N.B. APPRENTICES do not need to have been out of school for any period of time to be eligible for training under CMTP as long as they are adults as defined by the AOT Act.*

### **c) Special Criteria for BTSD**

Recently, the entrance criteria for BTSD were modified and new age and/or years out of school criteria were introduced.

They are as follows:

#### **Two years out of school**

Newfoundland  
Nova Scotia  
Ontario  
Saskatchewan  
Alberta  
Yukon

#### **Three years out of school**

Prince Edward Island  
New Brunswick  
Quebec  
Northwest Territories

#### **Other**

Manitoba – 21 years old  
British Columbia – 2 years out of school and 2 years beyond  
school leaving age.

### **d) Current Qualifications for Selected Occupations**

The actual qualifications of a client are very important in deciding on a client's suitability for a specific course. The decisions are individual-specific. This requires a comparison to such information sources as Monographs on the Occupations.



## e) Personal Characteristics and Client Motivation

The most important criterion of a client about which a counsellor must decide is the elusive quality of motivation. This is where the evaluation skills of the counsellor play a key role in client selection for training.

## F – Length of Sponsored Training

### 1. General

The AOT Act stipulates that the maximum time a client can stay on any *one* type of full-time training is fifty-two (52) weeks. The AOT Act does not, however, state how many courses a trainee may take, nor does it specify any interval which must elapse between courses. Decisions in this area are based on departmental policy.

When counsellors are identifying training plans, they do not have to restrict themselves to just one course. For example, a client is often referred to BTSD and Skill Training at the same time. This helps to ensure that the client will be ready for the labour market in the shortest possible time.

### 2. Occupational Upgrading

Any CEIC-sponsored training which a client has already received cannot prevent him/her from being considered for further training. What is important is whether or not the training which is being applied for currently will improve the labour market position of the client. In fact, in many occupations, a person might return to training a number of times in order to move to more advanced levels within the same occupation. However, at all times, the client must have an occupational goal which is acceptable to the counsellor.

### 3. Repeated Training

It is possible for a client to return to training in an occupation which is different from the one for which he/she originally received training. However, certain conditions apply:

- a) Retraining for an unrelated occupation will not normally be permitted except where changes in skill demand within the economy justify it.
- b) If a client selects a completely new occupational goal within two years of completing training in another occupation, the counsellor must exercise caution and judgment to ensure that there is a good reason for approval of further training. Changes may include, but are not restricted to, changes in the health of the client and special family circumstances. Clients will not normally be referred to a subsequent type of training until they have made reasonable use of the skills in the labour market.
- c) Clients who have dropped out of a previous training course may be reinstated. Counsellors should use flexibility in dealing with such situations.

- d) If a client previously failed in training, then the reasons for failure must be examined. There are three main reasons for failure: the wrong course was selected for the client; the client did not have the correct preparation for the course; and, the client was not able to handle the demands of that particular course. In each of these cases, the counsellor must reassess the probability that the client will succeed in the newly selected course and that the original reasons for failure do not apply in this case.
- e) If a client has been expelled from a previous course, the counsellor must discuss the following with the training institution before making a decision to refer to training:
  - (i) reasons for expulsion
  - (ii) reasons for supposition that the person can now succeed in training.

## G - Summary

This chapter describes training in more detail. It breaks down the five general kinds of general training: language, work adjustment, job readiness, basic training for skill development and it describes apprentice training. The three types of industrial training are outlined: vestibule, double-banking and on-the-job training. The general criteria for selection are outlined and, finally, regulations on length of sponsored training are provided.

## The Selection and Referral Process — An Outline

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Each client is unique and, as a result, so are the decisions which must be made in opting for training. However, for the counsellor, there is a process to be followed in selecting and referring clients to training and at each stage the counsellor must judge that (for that particular client) the provision of training will provide occupational skills which are:

- a) likely to improve his/her employability or earning capacity; and
- b) are required in the labour market.

### A – Counselling Skills

Integrated into all the counsellor's activities with the client is the use of counselling skills. In selection and referral, as in other services provided by the CEC, the work is facilitated by the use of counselling processes and techniques. *The Employment Counselling Guide* (currently in preparation) details how a counsellor can learn to use these skills most effectively and serves as a useful text for employment counsellors. In addition, counsellors can study in other training programs prepared by the Occupational and Career Analysis and Development Branch which are designed to improve skills. They are available through the regional counselling specialists and include the following videotapes:

- Tuning In: Intentional Attending
- Client-Counsellor Relationships and Other Things That Go Bump
- On The Job
- Groups That Work: Parts I and II

### B – Overview of the Selection and Referral Process

Table 2 outlines the steps in the selection and referral process. In some cases, the counsellor-client interaction will encompass several steps in one interview. In other cases, one step could require several interviews, in addition to a great deal of private effort by the client. In more detail, the steps are as follows:



## Table 2

### Selection and Referral Process – An Outline

Step	Content	Sub-Step
1.	Establish kind of service being requested	
2.	Establish client profile	a) Review client's file b) Establish client's language abilities c) Review stability of work history d) Establish academic functioning level e) Establish client's interests f) Establish client's aptitudes and abilities g) Establish life-style values h) Social and economic factors i) Aspirations and perceived alienation of work in client's life j) Personal traits k) Review of qualification's profile factors l) Synthesize client's factors
3.	Establish appropriate occupational goal(s)	a) Review client's profile b) Establish appropriate occupational goal(s) c) Identify requirements and characteristics of occupation(s) d) Assess client's probability of qualifying for occupation(s) e) Assess probability of client improving position in the labour market
4.	Define a career path for client	a) Restate preferred and related occupations b) Identify specific criteria for occupational eligibility c) Formulate action plan d) Select the option for implementation e) Agree to selection for training

- 
- |                                      |   |
|--------------------------------------|---|
| 5. Select training program           | a) Define specific program<br>b) Review training demands<br>c) Establish client commitment to course demands                            |
| 6. Refer to CEC – sponsored training | a) Decide to authorize training<br>b) Complete administrative referral forms<br>c) Monitor client while waiting for course commencement |
- 

### Step One: Establish Kind of Service Being Requested

In order to maximize the effectiveness of the counsellor-client interaction, the counsellor must first establish the reason for which the client has come to the counsellor.

Usually this step will be very short. Eg.:

1. *“Well, what can I do for you today?”*
2. *“What would you like today?”*

*The Employment Counselling Guide* details how to establish the purpose of the interview. The counsellor should pay special attention to non-verbal attending skills i.e. give the client enough time and encouragement to really establish the nature of the client's request. The requests are usually of two types:

- **Request for Job Placement or Other Specific Service**

If the client's immediate concern is job placement, then the counsellor should refer the client to the appropriate service such as CJST, MOPS, or the Job Bank. In this case, training is eliminated as an option.

If the client wants approval for apprenticeship, the counsellor can proceed to process the application.

- **Request for Non-Specific Service**

In the following situations the counsellor should consider selection as an option for further exploration:

- Specific request for training
- Experienced difficulty in obtaining work
- Expressed desire for some kind of career mobility

## Step Two: Establish Client Profile

The next step in the selection process is to gain knowledge of the client. This is absolutely essential if an appropriate training plan is to be designed. Unless this step is done well, the remainder of the selection process may be seriously flawed. It is suggested that the counsellor and client take as much time as requested in this phase. For many clients, it will be the first major attempt at gaining self-knowledge. It is possible that, including the administration of tests, this step will involve a number of sessions both at the CEC and on the client's own time.

In cases where Work Adjustment Training is used as part of the counselling service, this step could take a number of months.

Basically, it involves the following steps:

### a) Review of Client File

At this point, the client must have an EMP 2294 completed. If not, this is a first step.

*"Before we go any further, let me take a look at your file."*

This file will vary in completeness for clients. A new client may have only a registration form. Others may have a detailed history.

This brief review will allow the counsellor to begin to assemble a portrait of the client. It also allows the counsellor to establish open communication with the client, especially if the counsellor makes use of the open-ended questions.

*"You finished grade 12. What subjects did you like most in high school?"*

*"Your last job was in 1975. How do you feel about starting to look for work again?"*

### b) Establish Client's Language Abilities

Generally, a counsellor can establish language abilities at a gross level through conversation and this step is easily completed. However, for immigrants and migrants who do not speak the primary official work language of the area e.g. Francophones moving to urban areas of western Canada or Native people who speak only their indigenous language, this is a serious question. If, in the counsellor's opinion, it affects the client's opportunities for job placement, then he/she should consider language training for the client as a first step in the training plan which is to be designed.



### **c) Review Stability of Work History**

The next sub-step is to establish the client's history of adjustment to the labour market.

- a) What kind of work has this person had?
- b) How long did he/she keep any job?
- c) Why did he/she leave previous jobs? Is there any pattern?
- d) Job Satisfiers
  - What did the client like most about his/her previous jobs? e.g. salary, environment, responsibilities, location.
- e) Job Dissatisfiers
  - What did the client like least about his/her previous jobs? e.g. physical activities, supervision, travel time.

If the client has a history of the following:

- Rapid job turnover
- Poor or no references from former employers
- Unexplained gaps in career history
- Poor performance on the job
- Inability to socialize appropriately with peers
- Poor or hostile relationship with supervisors

then the counsellor should consider referring the client to Work Adjustment Training (WAT). This will have two advantages:

- Prepare client for improved labour market integration;
- Allow the counsellor and client to better establish the client's profile.

Such history may have to be obtained from sources other than the client.

### **d) Establish Academic Functioning Level**

Most clients will be able to indicate the last grade completed. In addition, the counsellor should establish any other formal education and/or training which the client has received. If the education was received in another country, the counsellor should translate it into the approximately equivalent Canadian level. This is not an easy task, especially for refugees. Help may be sought from departments of education.

If the counsellor cannot establish the level at which the client is functioning, the client can be referred to take a test to establish this level. Regional testing specialists can help counsellors identify approved testing centres. In many areas, the province and the training institution cooperate in this work.

An important area of questioning to help in assessing client's motivation for training is whether or not the client has attempted and completed training on his/her own initiative.

**e) Establish Client's Interests**

The next step is to identify client's interests. If these cannot be identified in the counselling interview, referral can be made for testing for the COII.

**f) Establish Client's Aptitudes and Abilities**

The next step is to establish what the client is capable of doing, either currently (abilities) or in the future after training (aptitudes). Again, testing may be required and the GATB can be used.

**g) Establish Life Style Values**

The next step is to decide how work in general fits into a client's value system. For example, if a client has no interest in extensive training, then the training plan must be geared accordingly. Similarly, if regular work hours are important, this information will shape the occupational goals.

**h) Social and Economic Factors**

Often, clients are not aware of the importance of certain social and economic factors in making job-related or training-related choices. A single parent may not be available to take a job involving shift work because day care facilities are not available. Or a client may have financial commitments that preclude living on a training allowance. Many of the factors identified in Part E of PLACE could be useful here.

It is important to know what the kinds of things are that a client does with non-job time or for relaxation. This is important because research has shown that the greatest job satisfaction is expressed by those who use their job-related skills in their leisure time.

The factors which should be considered in deciding whether or not training is an appropriate option are:

- **Finances**

Could the client meet living costs while on training. e.g. through training allowance, or support from family?

- **Responsibility for Dependents**

Does the responsibility for dependents interfere with potential training options or restrict the acceptable locations for training in any way?

- **Health**

Does the client have any health or additional problems which prevent training from being an appropriate option?

- **Physical Limitations**

Does the client have any physical limitations which must be considered in reviewing training as an option?

The “Sourcebook on the World of Work”, Part E of PLACE, would be useful for the client to complete in order to identify possible solutions to these problems. Implementation of solutions could assist in having training being considered as a viable option.

**i) Aspirations and Perceived Salience of Work in Client’s Life**

A very personal value system for each client are the needs which work can provide. The counsellor should assess what a client’s aspirations are: sometimes immediate job placement or CMITP may be more effective in meeting the client’s needs than is CMTP.

**j) Personal Traits**

The guide to the qualifications profile factors provide a simple summary of what the counsellor should take into account. These are the same factors which a counsellor would consider in job placement. Figure 2 is a handy guide to counsellors for the following factors:

- **Physical Activities**

What are the kinds and duration of activities which a client is willing to do?

- **Environment Conditions**

What are the kinds of environmental conditions a client will accept? If someone is very sensitive to heat, then considering the person for work in a foundary might be inappropriate.

- **Data-People-Things**

What are the kinds of D.P.T. activities which the client wishes to do?



### k) Review of Qualifications Profile Factors

Once the counsellor has assembled the relevant information on a client, he/she should review it with the client. This may identify some areas of missing data or cause the client to reconsider certain descriptions.

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#### SAMPLE REVIEW

*“Let’s look at what we know so far. You speak English and French fluently. You have completed your grade 12 and have taken word processing courses. Your jobs to date have been on word processing units and you left the jobs to broaden your experience. You dislike having to travel long distances to work but there is nothing which suits your present qualifications in your own area. You could get by on your unemployment insurance benefits during training. Your interests focus on working with things and objects and you like to work under stress. You would like to move into computer programming where there are more opportunities for advancement and greater job security. Does that sound right to you or would you like to change something?”*

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This review provides the necessary data for the client and counsellor to make judgments.

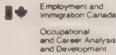
### l) Synthesize Client’s Factors

Often the hardest step in this process of drawing up the client’s profile is not the analysis of each component but rather the synthesizing of the wealth of information which is available. It involves some interpretation by the counsellor of what this information means. The counsellor should consider drawing up a thumbnail portrait of the client. When this is done, it becomes feasible to determine if training is an appropriate option. If training is not appropriate, the counsellor should consider other options.


In synthesizing, the counsellor uses his/her skills of interpretation. It is at this point that the facts are given real meaning and those which are irrelevant can be dropped from further consideration.

In going through each of these sub-steps both the client and the counsellor have the opportunity to draw an accurate picture of the client.

Figure 2: Guide to Qualifications Profile Factors



Employment and Immigration Canada  
Occupational and Career Analysis and Development



Emploi et Immigration Canada  
Analyse et développement - Professions et carrières

### Guide to qualifications profile factors

#### 1 General Education Development (GED)

Levels      Approximate Duration of Schooling

- 6 — 17 years plus
- 5 — 13 to 16 years
- 4 — 11 to 12 years
- 3 — 9 to 10 years
- 2 — 6 to 8 years
- 1 — Up to 6 years

#### 2 Specific Vocational Preparation (SVP)

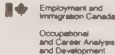
- 1 Short Demonstration Only
- 2 Anything Beyond short demonstration up to and including 30 days
- 3 Over 30 days up to and including 3 months
- 4 Over 3 months up to and including 6 months
- 5 Over 6 months up to and including 1 year
- 6 Over 1 year up to and including 2 years
- 7 Over 2 years up to and including 4 years
- 8 Over 4 years up to and including 10 years
- 9 Over 10 years

#### 3 Physical Activities (PA)


- 1. Strength (lifting, carrying, pushing, pulling) shown in terms of:
  - S — Sedentary work (10 lbs. max)
  - L — Light Work (20 lbs. max)
  - M — Medium work (50 lbs. max)
  - H — Heavy Work (100 lbs. max)
  - VH — Very Heavy Work (over 100 lbs.)
- 2. Climbing and/or Balancing
- 3. Stooping, Kneeling, Crouching and/or Crawling
- 4. Reaching, Handling, Fingering and/or Feeling
- 5. Talking
- 6. Hearing
- 7. Seeing in terms of: acuity far and near, depth perception, accommodation, colour vision and field of vision.
- 8. Control: hand; foot

#### 4 Environmental Conditions (EC)

- 1. Work Location: I — Inside; O — Outside; B — Both
- 2. Extremes of cold plus temperature changes
- 3. Extremes of heat plus temperature changes
- 4. Wet and/or humid
- 5. Noise and/or vibration
- 6. Hazards in terms of: mechanical, electrical, burns, explosives, radiant energy
- 7. Atmospheric Conditions in terms of: fumes, odours, dusts, mists, gases, poor ventilation



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#### 5 Data (1st digit)

- 0 Synthesizing
- 1 Co-ordinating
- 2 Analyzing
- 3 Compiling
- 4 Computing
- 5 Copying
- 6 Comparing
- 7 .....
- 8 No Significant Relationship

#### People (2nd digit)

- 0 Mentoring
- 1 Negotiating
- 2 Instructing
- 3 Supervising
- 4 Diverting
- 5 Persuading
- 6 Speaking-Signaling
- 7 Serving
- 8 No Significant Relationship

#### Things (3rd digit) (DPT)

- 0 Setting-Up
- 1 Precision Working
- 2 Operating-Controlling
- 3 Driving-Operating
- 4 Manipulating-Operating
- 5 Tending
- 6 Feeding-Offbearing
- 7 Handling
- 8 No Significant Relationship

#### 6 Aptitudes (Apt)

Aptitude Levels (in terms of working population)

- G General Intelligence
- V Verbal Ability
- N Numerical Ability
- S Spatial Perception
- P Form Perception
- Q Clerical Perception
- K Motor Co-ordination
- F Finger Dexterity
- M Manual Dexterity
- E Eye-Hand-Foot Co-ordination
- C Colour Discrimination

1. Upper 10%

2. Upper Third exclusive of the Highest 10%

3. Middle Third

4. Lowest Third exclusive of the Lowest 10%

5. Lower 10%

When these levels are underlined, they are considered significant for satisfactory job performance.

#### 7 Interest Factors (Int)

- 1. Things and Objects
- 2. Business Contact with People
- 3. Routine, concrete and organized work
- 4. Working for people for their presumed good as in the social welfare sense, or for dealing with people and language in social situations.
- 5. Work resulting in prestige or esteem of others
- 6. People and Communication of Ideas
- 7. Scientific and Technical Work
- 8. Abstract and creative work or experiences
- 9. Non-social work, carried on in relation to processes, machines, and techniques
- 0. Work resulting in tangible, productive satisfaction

#### 8 Temperament Factors (Temp)

- 1. Variety and Change
- 2. Repetitive, Short Cycle
- 3. Under Specific Instructions
- 4. Direction, Control, Planning
- 5. Dealing with People
- 6. Isolation
- 7. Influencing People
- 8. Performing Under Stress
- 9. Sensory or Judgmental Criteria
- 0. Measurable or Verifiable Criteria
- X. Interpretation of ideas, facts, feelings
- Y. Precise attainment of set limits, tolerances or standards

### Step Three: Establish Appropriate Occupational Goals

When making plans for any trip, one must have an idea of the point one wants to reach. Establishing the goal, then, allows one to evaluate its appropriateness as well as to identify the resources which are to be involved in attaining the goal. Similarly, in the selection process, the usefulness and/or necessity of training can't be decided without knowing the goal. The statement of goals by the client forms one of the fundamental steps in subsequent successful labour market integration i.e. in placing the right client in the right job. It is also one of the most difficult steps to complete.

This step lays tremendous importance on the counsellor's knowledge of occupations and of related sociological, psychological and economic factors. Knowledge of the labour market is essential. The counsellor will have to make use of such publications as the CCDO, Careers Canada, Careers Provinces, and economic publications as well as such sources as radio, television and periodicals.

Occupational goal(s) should not be established until both the client and counsellor have an accurate client profile. If the profile is incomplete, many appropriate options will never be considered.

If the client has stated goals, then this is an appropriate time to review them in light of the knowledge of the client. Such establishing of goals should work to prevent arbitrary assignment of clients to any available training.

*e.g.: "Now we have a pretty accurate picture of the kind of things you might like to do. Let's see what kind of occupations they match."*

In this step, the counsellor has already completed an analysis of the client and arrived at a synthesis. Now he/she begins to input labour market information into the process. Reality is imposed on possibilities.

**Caution: It is very easy to introduce and impose one's own biases of what constitutes an appropriate occupational goal for a client. Counsellors must be flexible and must keep an open mind to all possibilities, especially when non-traditional occupations are potential goals.**

#### a) Review the Client Profile

If there is a time interval between steps Two and Three, then the counsellor and client should take a few minutes to review the client profile.

#### b) Establish Appropriate Occupational Goals

The next sub-step is the crucial one of establishing suitable goals. Often the client will already have an idea of what he/she would like to do. The counsellor must judge the appropriateness of the goals.



In the following situations the counsellor should request that the client complete an occupational goal-setting exercise using such tools as the Index to Canadian Occupations (ICO), CHOICES, or MOVING ON:

- Goals appear to be inappropriate because of poor match between client profile and job requirements.
- Goals are very diverse and not related e.g. client's first choice is hairdresser and second choice is nuclear physicist.
- There is very little demand for such occupations.
- Client has no idea of what occupations he/she would like to enter.

### **c) Identify Requirements and Characteristics of Occupations**

The next sub-step helps in the assessment of how well suited the client is to the specific characteristics and requirements of the occupation. If the client is not aware of what these are e.g. licensing requirements, physical activities, then he/she should complete a search to identify these characteristics and requirements. Making a change in a chosen occupation at this point could save a great deal of time later on. The point of this step is to eliminate potential future negative surprises. If this sub-step is skipped, no time is saved in the long run.

Both the client and the counsellor should be aware of the details of the chosen occupation. The counsellor can review the monographs or Careers Provinces description. The client could complete an information search using PLACE or CHOICES.

### **d) Assess Client's Probability of Qualifying for Occupation**

Knowing the client's characteristics and knowing the occupational requirements, the client and counsellor must decide on the probability of the client achieving these goals. Sensitive counselling may be involved in this comparison. Furthermore, the counsellor must be very aware of imposing his/her own value system on the client.

In addition, there is usually no definite negative answer to the question of whether or not the client could perform the requirements of the occupation. There will always be someone who will defy all negative expectations and succeed. However, it is up to the counsellor to encourage the client to aim for those areas where he/she has the greatest likelihood for successful labour market integration. Assessment of the client by a potential employer can be an important technique. Many clients have no realistic idea of the work environment or the work content. Such exposure is often very motivating to clients when they can relate the payoff from completing training to an actual job.

If this assessment reveals that the occupational goal should be reassessed, then the client can repeat the selection exercises.

#### **e) Assess Probability of Client Improving Labour Market Position**

In this sub-step, the accuracy of the counsellor's knowledge of the labour market is crucial. For instance, there is probably little reason to recommend that a woman take hair dressing if the market is already flooded with qualified hairdressers.

The counsellor and client should look at the occupation(s) appropriate for the client and decide which, if any, are most likely to lead to improving the client's position in the labour market. This sub-step is especially important if there is the chance that training is being taken simply for the sake of training. In that case, the counsellor cannot justify continuing in the selection process.

At this step, the counsellor should provide specific information to the client on the career progress of past graduates. This should include the success rate in course completion, the success rate of placement in same or related occupations, name of employers, rate of pay and rate of pay increases, and seasonality of work. Such information could be obtained from the liaison counsellor, the training institution and the district economist. This data will maximize the realism of the chosen training program.

If this reality testing results in a negative answer, the client should redo the selection of occupation exercises.

### **Step Four: Defining a Career Path**

As in the planning of any trip, once people know where they are and where they want to get to, the next step is drawing up a road map to figure out the best way to get to the planned destination. This is the purpose of defining a career path. It outlines the steps a person must take in order to achieve his/her goals. As well, it outlines options in case any route must be bypassed.

The career path cannot be established until the client has an accurate picture of his/her own characteristics and of goals. In actual amount of time, this should be a fairly straightforward step.

**CAUTION: Most people, counsellors included, have never devised a career plan and, therefore, would like to skip it. But it is very important - especially for CEC clients who, typically, lack planning skills.**

The process is as follows:

#### **a) Restate Preferred and Related Occupations**

The counsellor must restate the client's exact destination in the labour market.

*e.g.: "OK, Now with your mechanical abilities you want to be a stereo repair technician. Or, perhaps a television repairer. Let's see what you have to do to qualify."*

Notice that the two choices in the example are closely related and therefore meet the client's characteristics and aspirations. Most occupations have several others related to them. CHOICES can help a counsellor find related occupations for which training might be more readily available.

#### **b) Identify Specific Criteria for Occupational Eligibility**

This sub-step introduces the need for specific detail.

*e.g.: "Well, you are going to need a high school equivalency as well as grade 12 math and science. You are going to need a 1-year training program which will cover electronics, mathematics and options such as English. Providing your own tools is going to cost you about \$200."*

A checklist like the one outlined in PLACE should be used. Again, the counsellor's role is to eliminate potential unpleasant surprises for the client.

#### **c) Formulate Action Plan**

The next sub-step is to determine exactly what should be done.

*e.g.: "I suggest you take a BTSD course to get your high school equivalency. After that, we'll look for work in a stereo equipment store until the next repair course has a vacancy for you. At the same time, you can pick up a course or two at night school to speed things up."*

Some plans may be very straightforward. With minimum training or an upgrading course a person could find work in his/her area of primary interest. Other plans may be very complex and include recurrent training over a period of years. Figure 3 outlines a variety of plans. There are a tremendous number of combinations and permutations of options and it is up to the counsellor to put them together creatively.



#### d) Selecting the Option for Implementation

The next sub-step is to refer a client to the options which have been formulated on the action plan. If training is an initial part of this plan, the counsellor should go on to review the training options. If not, then the counsellor should consider the following – either separately or in combination:

- Improving job search techniques;
- CMITP placement;
- Qualifying client for occupation through other means such as taking an exam;
- Acquiring experience through volunteer activities;
- Acquiring experience through a government-sponsored work experience program;
- Job placement.

Both the counsellor and the client must keep in mind at all times that the ultimate product of CEC service is successful labour market integration, usually defined as job placement.

#### e) Training Selection

At this point the counsellor makes the judgment to approve CEC sponsored training. If the decision is negative, then the counsellor should discuss *other training options* which include:

- Part-time education programs;
- Correspondence courses;
- Post-secondary institutions, full and part-time;
- Adult-only secondary schools;
- Any other option which might be useful.

The publication *College and University Programs in Canada* and, when available, the Education and Training file of CHOICES will help the client and counsellor.

*N.B. If the client does not accept the counsellor's refusal to authorize training, he/she can request that the supervisor or manager review the decision.*

**Figure 3:** Samples of Career Plans for CEC Clients

**1. Former Secretary Returning to Labour Market**

- (1)

(a) Skill Training
- (2)

CJST
- (3)

Job Placement
- or (1)

(b) Night School
- (2)

CJST
- (3)

CMITP  
Placement
- (4)

Job Placement

**2. Client Experiencing Difficulty in Adjusting to Labour Market**

- (1)

WAT or JRT
- (2)

BTSD
- (3)

Skill Training
- (4)

Job Placement

**3. Recent Non-English Speaking Immigrants**

- (1)

Language  
Training
- (2)

BTSD
- (3)

CMITP Contract  
Placement
- (4)

Job Placement

**4. Client in Occupation with Surplus Labour Supply**

- (1)

Mobility Canada
- (2)

Job Placement
- or (1)

Skill Training
- (2)

Job Placement

### Step Five: Selecting the Training Program

The purpose of this sub-step is to complete the selection process and to begin the referral process. It should only be done when all the other pieces in the selection puzzle have been put together. It is occasionally turned upside down and a client is selected to fill a course rather than a course being selected for a client. This is incorrect procedure.

The method is as follows:

#### a) Define Specific Program

The counsellor and client agree on the specific program to be followed e.g. BTSD III followed by a 48-week course in cabinet-making. The client also establishes the location at which he/she is willing to take the program e.g. BTSD at nearest college and cabinet-making anywhere in the province.

In this step, the two will make extensive use of the Course Descriptions Sheets (or regional equivalents e.g. in Ontario, "The Course Information Supplement"). This is an essential tool – especially where it identifies specific pre-requisites or test requirements.

The counsellor will also indicate the timing of the program e.g. 104 weeks of BTSD and skill training or BTSD completion followed by work experience, followed, in turn, by Skill Training.

#### b) Review of Training Demands

At this point, the counsellor must review the specific demands of the course and what it is going to mean to the client.

*e.g.: "To take this course you will have to show proof of vision test for colour blindness and have biology and physics."*

#### c) Establish Client Commitment to Course Demands

This is an essential step in establishing the motivation of the client. At this point, the client accepts the demands of the course to the degree to which he/she understands them or rejects them. If the demands are accepted, the referral process is begun.

If the client rejects the demands, the counsellor can do two things. The first is modify the proposed training program to one the client will accept and which is in line with the approved occupational goal (which may also have to be modified). The second option is to review the non-training options leading to job placement.



## Step Six: Refer to CEC-Sponsored Training

The purpose of this step is to take care of the administrative procedures required to have the client sent on training.

*Note: Section 39 – Unemployment Insurance Act:*

*Counsellors should be aware that the process for referral of fee-payers and non-fee payers varies slightly. Under Section 39 of the Unemployment Insurance Act, a client may choose to pay his/her own fees in order to continue to receive U.I. benefits which are higher than the training allowance for which he/she is eligible. In this case, approval must be obtained from the appropriate insurance officer.*

In general, referral to training cannot be completed until the client and the counsellor have worked through the selection process. However, there may be cases where the course to be taken is a decision taken outside the selection process and merely requires the counsellor to fill in the appropriate forms. Examples include apprenticeship and courses of ten days or less for farmers and fishermen. In these situations the counsellor is involved only with the referral process.

The method is as follows:

### a) Counsellor Decision to Authorize Training

Whether or not the counsellor has worked through the selection process with a particular client, he/she must decide if he/she is willing to authorize training. *This is the special prerogative of the counsellor.* This decision can only be revoked by a more senior CEC officer such as the CEC manager and only under very special circumstances.

If the counsellor decides *not* to authorize training, he/she must record the reasons on file in case the client appeals the decision. Furthermore, he/she must ensure that the client is very well aware of the reason for lack of authorization.

Reasons to refuse authorization include, but are not restricted to:

- Course would not substantially improve the client's position in the labour market.
- Course does not lead to any appropriate job placement.
- Client is unwilling to relocate to location of available job opportunities related to course.
- Client does not demonstrate sufficient motivation to complete course.
- Client does not have the demonstrated aptitude and/or ability to complete training.
- Client lacks essential non-training requirements to function acceptably in related job placement.

Each of these reasons should be documented with specific examples to justify the judgment made by the counsellor.

### **b) Completion of Administrative Referral Forms**

Each region has a slightly different administrative procedure and the counsellor must become familiar with it.

### **c) Commencement of Course**

Depending on the characteristics of the client and the type of training being selected, the client may or may not begin training immediately. The following are typical situations after completion of forms by counsellor:

- Client begins the course almost immediately. Typically, these are clients going on language training or BTSD where there are minimal or no formal pre-requisites and where there is continuous entrance and exit of students.
- Client is designated as a member of a specially-designated group for that region and is assigned the first available training space for members of that group.
- Client is placed on Wait List where his/her priority is established according to date of referral. He/she goes to training when his/her name reaches the top of the list.
- Client's referral is recommended by the Joint Assessment Process and approved by the authorizing counsellor and his/her name is placed on the Wait List. When client has sufficient priority on list, he/she goes to training course.

**Caution:** When referring client for consideration by a joint assessment process, take special care that the file is complete and fully documented concerning the reasons that the client should go on the training program. Failure to do so could result in an inappropriate judgment that the client should not be authorized by the counsellor to go on training. This is a major responsibility of the authorizing counsellor.

### **d) Monitoring on Course**

The final sub-step is to monitor the client's progress on course.

## **C – Other Players in the Decision-making Process**

In each step of the selection and referral process, different factors are impinging on the direction of the decision-making process of the client and counsellor.

### **1. National Operating Rules and Regulations**

There is a great deal of material developed by, approved by and coming from CEIC National Headquarters. The four primary groups concerned with selection and referral to training are:

- (i) Training Branch – originators of guidelines and regulations concerning training.
- (ii) Employment Operations Group of Employment and Insurance Services Branch – originators of guidelines and regulations concerning all operational procedures in the CEC.
- (iii) Occupational and Career Analysis and Development Branch – originators of counselling tools and techniques for counselling including counsellor training and programs.
- (iv) Strategic Policy and Planning – analysts of economic data used in the identification of quantity and type of training required to meet labour market needs.

The four groups must develop and co-ordinate policies and programs which will maximize the effectiveness of the training program in macro-terms.

## **2. Regional Operating Rules and Processes**

Each region has the option of modifying certain components of the selection process as specified by NHQ in order to best meet the needs of the particular region. Selection for training is affected by the regional training, counselling, operations and economics specialists.

## **3. Specific CEC Regulations**

Each CEC has a specific operating style designed to implement the regulations from national and regional headquarters.

## **4. Training Institutions**

The specific training institutions where a course is given often have pre-requisites or entrance requirements. A counsellor must ensure that a client meets these. A training institution may provide an informed opinion on the client's suitability for a course.

**Caution:** The training institution may provide input to the assessment process. However, in any course paid for by the CEIC, it is up to the CEC counsellor to make the decision on client suitability. If a counsellor encounters problems in this area, he/she should contact CEIC regional office.



### 5. Provincial Departments of Labour (or equivalent)

The provincial departments of labour establish the licensing and entrance requirements for many skilled occupations. Therefore they can provide essential input into the decision-making process. Often, this input is provided during the Joint Assessment Process.

**Caution: Provincial departments of labour (or equivalent) can and may have input into the decision-making process. But they do not participate in the actual decision making.**

### 6. Other Advice Givers

It is often possible, especially for special needs clients, that other agencies will have information or opinions which should be considered in the selection process.

## D - Summary

This chapter describes the steps of the selection and referral process and the role of other participants.

## Counselling Tools and Techniques for the Selection Process

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There are many summaries available to the counsellor which outline the tools and techniques available in the selection process. One such guide is *Methods and Materials of Vocational Counselling* which is produced by the Occupational and Career Analysis and Development Branch of CEIC.

In reviewing a client's case for selection to training, the counsellor must (should) collect as much data as is reasonable to make a sound judgment. While a lot of material may be available if the counsellor searched for it, the pay-off for great detail might not be worth it. It is up to the counsellor to decide what amount of information is reasonable.

The tools and techniques are developed into four categories in this chapter.

### **A. – Previous Records for Client**

- to provide background information on a client.

### **B – Testing**

- to provide current information on a client.

### **C – Counselling Tools**

- tools a counsellor can use to identify specific problems and solutions for a client.

### **D – Economic Information Tools**

- tools which allow a counsellor to relate the client's occupational choice to the labour market.

There is no fixed way to use these tools. The counsellor should be familiar with all of them in order to select the most effective combinations for a particular situation. If a counsellor is in doubt, the regional counselling specialists can serve as resources.

## A – Previous Records for Client

Counsellors can save a great deal of time by using information which is already available. Clients can supply the information or counsellors can obtain it through other agencies.

### 1. School Records

If clients are being considered for training, they can provide information on level of academic training. Counsellors should keep in mind that over four million Canadians are considered functionally illiterate (i.e., primary school education or less) and often are very sensitive on this matter.

However, a review of a client's previous grades can often support a referral to a specific kind of course or can identify areas which must be upgraded in order to increase chance of success.

### 2. Community Agencies

Many clients have already been tested through other agencies and, if asked, will be willing to have such results released. This can be especially true for clients who have used services such as:

- Family Service Centres
- Psychological and counselling services of local universities and community colleges
- Municipal and provincial social service agencies
- Canadian Forces Social Work Services or Career Counselling Services
- Salvation Army Counselling Services
- Workmen's Compensation Board
- Vocational Rehabilitation Services of the provincial governments
- Provincial March of Dimes Groups
- Probation and Parole Services of the province
- Department of Veterans' Affairs
- Counselling services of the YM-YWCA
- Community psychiatric services
- Canadian National Institute for the Blind
- Canadian Hearing Society
- Counselling services for Native People, e.g., local groups supported by Department of Indian and Northern Affairs

Often, if counsellors in these agencies cannot release specific results, they can provide background information which will help the counsellor make a better judgment on the appropriateness of certain kinds of training.

### 3. CEIC Records

Many clients already have files established at some CEC's. Such files can provide a lot of historical data on a client including job history and previous test results. It is a saving of both time and money for client and counsellor.



## **B – Testing**

Chapter 12 of the Employment Manual expands on the why and how of testing.

### **1. Purpose of Testing**

In employment counselling, tests may provide information about a client's aptitudes and abilities that may otherwise require considerable interviewing and/or counselling time. This supplementary data serves as an aid in the identification and formulation of suitable training and employment plans. To this end, aptitude tests, interest inventories, and/or tests of special abilities such as typing tests, stenographic tests, and colour discrimination tests may be used.

### **2. Use of Testing**

Certain cautions must be recognized by any counsellor who intends to use testing.

- a) Tests/testing are not to be used in isolation to establish the superiority of one candidate over another.
- b) Tests are only one source of information to be used in the decision to refer or not.
- c) No one shall be pre-selected on the basis of test results alone. Tests should never be used in isolation by qualified CEC counsellors for pre-selection/referral purposes.

### **3. Arrangements for Testing**

Since 1979, only certified counsellors can administer and interpret tests. Counsellors can make arrangements for testing according to their own CEC policy.

### **4. Tests**

Under the employment counselling policy, only tests which have been authorized by Employment Counselling Division of the Occupational and Career Analysis and Development Branch can be administered by CEC counsellors. The tests are available in English or in French equivalent and are as follows:

a) General Aptitude Test Battery (GATB):

- designed to measure the potential a client has in nine areas: general, verbal aptitude, numerical aptitude, spatial aptitude, form perception, clerical perception, motor co-ordination, finger dexterity and manual dexterity. Raw scores are translated into standings relative to the Canadian population and to those of specific occupational groups.

b) Canadian Occupational Interest Inventory (COII):

- this is an inventory to identify the client's occupational interests and involves ten scales: things, business contact, routine, social, prestige, people, scientific, creative, solitary and production.

c) Colour Discrimination Test:

- this test identifies the ability of a client to distinguish among colours. A number of skilled occupations require this ability.

d) Straight Copy Typing Test:

- this is a measure of pure key stroking speed and accuracy.

e) Shorthand Dictation Test:

- this measures speed and accuracy of ability to do shorthand dictation.

Through the regional counselling specialists, who co-operate with the Employment Counselling Division, OCAD, NHQ, arrangements can be made with the training institutions for two other kinds of tests.

a) Academic Functioning Level:

- this test identifies the academic performance level of a client in order to assign him/her to the correct level of BTSD.

b) Language Level Tests:

- these tests will assist in the correct placement of a client who must learn English or French and provide an estimate of time the language course will take.

## C – Counselling Tools

There are a great number of employment counselling tools available to the counsellor. If you require information, contact regional counselling specialists. Also, the Occupational and Career Analysis and Development Branch (OCAD) has published a catalogue called *Employment Counselling Materials* which gives a more detailed description of what is available from OCAD for use by the counsellors. Some of the most useful are the following:

### 1. Canadian Classification and Dictionary of Occupations (CCDO)

The CCDO is an encyclopedia of occupational information on over 6,700 occupations in Canada. It classifies and describes the occupations and also describes characteristics of people who are successful in a group of related occupations.

Each year a soft-covered Annual CCDO Guide is published. This Guide explains how to use the CCDO and provides the counsellor with information on how to convert occupational information to fit descriptions in the CCDO.

### 2. Careers Canada

Careers Canada is a series of booklets on families of occupations that are engaged in the same or similar fields of work. The series covers occupations that require some degree of planning for entry, especially preparation through education, training and other requirements. Descriptions are general and non-technical and they give readers a feel for the work context of occupations and their inter-relationships.

### 3. Careers Provinces

Careers Provinces is a series of fact sheets on specific occupations. The series provide information on requirements, conditions and other details relating to individual occupations as they exist in each province or territory. The series consists of one fact sheet for each of approximately 650 occupations in each province.

### 4. College and University Programs in Canada

This information was developed to help students and potential students identify and associate educational and training programs with particular institutions. The tables also help users establish a connection between these programs and the world of work.



## 5. PLACE – Guide Steps to Employment Readiness

PLACE is a programmed employment counselling tool that can be used by individuals alone, or by clients and counsellors together, to assess their employability in terms of selected occupations. The system allows examination of the requirements of an occupation, helps people to determine if they meet those requirements, and provides assistance in finding ways to overcome any barriers discovered.

## 6. CHOICES

CHOICES is an interactive computerized career information system. People communicate directly with a computer and provide information on themselves which is matched to that on the 1,115 occupations which are detailed. A further 3,000 similar occupations are also identified. There are four main routes to the occupational information stored in the computer's memory banks.

- “EXPLORE” which allows people to input personal data and in return receive suggestions of potentially suitable occupations.
- “SPECIFIC” provides detailed information, tailored to the individual's needs, for any occupation about which the user wants information.
- “COMPARE” provides relevant data on up to three occupations at a time.
- “RELATED” identifies other occupations sharing specific characteristics.

## 7. Index to Canadian Occupations (ICO)

The ICO helps people to explore the world of work and to choose career goals. Users find occupations that might be suitable by choosing characteristics that describe them or the kind of work they might like to do.

## 8. Moving On

*Moving On* is a self-directed investigation of the world of work particularly as it relates to youth. In addition to Self-Assessment, Occupational Exploration, Decision Making and Job Search, *Moving On* also deals with work norms, i.e. the expectations employers have of employees, and the affective aspect of career development concerning such matters as uncertainties, disappointments and rejections. Section One, *Moving on a Career*, is particularly useful in that it deals with the skills and knowledge required in planning a career.

## 9. Local Tools

In addition to the above, which have been developed by the Occupational and Career Analysis and Development Branch of NHQ, many regional counselling specialists can provide useful instruction on those which are favoured locally.

## D – Economic Information Tools

The economic tools to which an employment counsellor has access are often less useful to work with a specific client's situation than as a broad background base on which counsellors will base decisions for the relevancy of occupational choice on the existing labour market. The following are the major tools.

### 1. The Canadian Occupational Forecast (COFOR)

COFOR is a publication that forecasts demand for 500 occupation groups over periods of eight years. The occupation groups that are dealt with are those which generally do not require extensive post-secondary education, but rather specific vocational preparation such as on-the-job training and apprenticeships. It is published in a series of booklets based on geographic areas. There is a booklet for Canada as a whole, one for each province, and regional overview booklets for the Prairies and the Atlantic provinces. Separate publications deal with highly qualified manpower and the methodology used in making the occupational forecasts.

### 2. Mobility Canada

This book is printed annually by the Occupational and Career Analysis and Development Branch. It provides housing and community information for some 200 selected cities across Canada and is primarily a reference publication containing specific information on the mobility needs of clients in Canada and abroad.

### 3. Job Vacancies Information

Systems such as MOPS and the National Job Bank provide listings of job vacancies. From regular reviews of such information a counsellor can deduce appropriate areas for training clients.

### 4. Economic Publications

Many publications provide continuing readings on growth and decline areas of the economy which are reflected in job vacancies. Labour Canada has publications such as *Labour Data* which detail these changes, but even regular reading of the financial pages in the daily newspaper will help the counsellor in making an assessment of the potential payoff of a specific type of training.

## E – Summary

This chapter describes the tools and techniques which a counsellor can use in the selection process. These include previous records on the client, testing, counselling tools, and economic information tools.

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## Decision Making by the Client

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### A – Necessity of Client Commitment

While the counsellor makes the decision concerning CEIC sponsorship of a client on training, the most important decisions are made by the client, who has to be committed to each of the decisions he/she makes. For this reason, the counsellor must take care not to bulldoze a client into anything. There is a great difference between providing information and direction and rushing a client into something he/she doesn't fully comprehend. It should be an ingrained characteristic of the counsellor to check that the client understands the consequences of each decision.

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#### SAMPLE:

- 1. Now you know if you take the training in underwater skills that much of your work will involve living away from home – sometimes up to six weeks at a time.*
  - 2. All right, aircraft maintenance sounds like it might be a good trade for you. The course is going to rely on a background in algebra, physics and mechanics or electricity. Do you want to work in this kind of area?*
- 

The counsellor must review each step as they move through the decision-making process. If the client has doubts or concerns, these doubts must be resolved before continuing any further. Otherwise, the client may commence training and be so overwhelmed by what he/she has got him/herself into that he/she quits. At the same time, he/she has never considered any other option so the whole exploration process must commence at the beginning once again.

### B – Points of Decision

Each and every step of the selection and referral process involves decision making by both the client and the counsellor. However certain points stand out more clearly as junctions. Both the client and counsellor must be aware that the decision to reject training is not a negative situation but rather is the selection of another more appropriate option.

Chapter IV – The Selection and Referral Process, outlines the steps in the process. During this process, both counsellors and clients must continually ask the following questions. Only if the answer is affirmative should the selection process continue towards referral. These questions are:



- Should training be considered as a viable option?
- Will training either increase the client's earning capacity or opportunities for employment?
- Does the selected occupational goal seem appropriate for the client?
- Are there jobs available in this occupation? If so, are they in a location where the client is willing to work?
- All things considered, does the client want to work in this occupational area?
- Does the client want to go on this training program?
- Is training under CMTF the most appropriate method of achieving this goal?
- Is the client likely to successfully complete the training program?
- Is the counsellor prepared to authorize training for this client?

Each of these questions assumes that sufficient information has been collected and assessed so that a responsible decision can be made. If a "no" is given to any of these questions, then other options should be given priority consideration. However, it is important for the counsellor to remember that the benefit of doubt will always go in the client's favour.

## C – The Counsellor's Role in Decision Making

The counsellor plays two roles in the selection and referral process. The first role is that of facilitator to assist the client in reaching a decision. An analogy would be that the counsellor serves as a map-maker and ensures that the client can read the personal career path plans clearly and effectively so that the client can make his/her own decisions. The counsellor must be very careful not to impose his/her own value systems. Clients who lack self-confidence may be all too anxious to pick up clues from the counsellor. If a counsellor says things like "I doubt very much that a woman could ever handle a job like that", then a number of excellent potential applicants could refuse to even consider a specific occupation as an appropriate option.

The second role appears to conflict a little with the first role, which emphasizes being a non-judgmental reviewer who is acting primarily in the service of the client. In the second role, the counsellor acts on behalf of CEIC and must consider the impact of the client's decisions on the labour market. In this role, the counsellor must make the judgment of whether or not to approve training. To do this, the counsellor must have sound reasons for accepting or rejecting the training option. It is important to remember that the decision to approve is not necessarily better or worse than the decision not to approve. What is important is that the counsellor make a professional decision on whether or not training should be recommended within the provisions of the Adult Occupational Training Act.

## D – Activities for the Client

The counsellor must encourage the client to do as much as possible in reaching decisions. Even if the client decides not to take training, the exploration of options will be a very beneficial exercise which too few people ever complete. In planning and weighing alternatives, clients should be encouraged to be as flexible as possible. Many clients do not realize that there are occupations related to their first choice which may be more suitable for them.

The counsellor should encourage the client to do all of the following activities. In fact, one counselling technique is to enter into a form of contract in which the client agrees to do certain specified activities by a stated date.

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### SAMPLE

*Counsellor: "By your next appointment will you read the Careers Canada book and write down a few reasons why this kind of work would suit you and why it wouldn't suit you?"*

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#### 1. Personal Reflections

The client must be encouraged to examine why a certain option would be appropriate. This can eliminate a lot of fuzziness of thinking.

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### SAMPLE

*Counsellor: Why would you like to become a sheet metal worker?*

*Client: Well, my cousin went into it.*

*Counsellor: Can you tell me something about his work?*

*Client: Well, it's outside.*

*Counsellor: You would like to work outside?*

*Client: Well, yeah I guess so.*

*Counsellor: Why would you like outdoors work?*

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Getting the client to think about him/herself can eliminate a client's tendency to use the supermarket approach where the client has not focused on any one occupation or group of related occupations. Counsellor training packages such as "Client Counsellor Relationships" and "Tuning In" are useful reviews for counsellors to assist the client in personal reflection.

## **2. Discussion with Family and Friends**

For the majority of people, the reactions of family and friends play a very important role in decision making. The client should be encouraged to discuss his/her occupational choice and how the choice is to be realized. A client whose family is supportive is more apt to complete the course successfully.

## **3. Discussions with Potential Employers and Workers in an Occupation**

The main point of sponsoring a client on employment training is to improve his/her position on the labour market and that includes reduction in job turnover involving periods of unemployment. Therefore, when the client has focused on an occupational area he/she should be strongly encouraged to investigate job opportunities in the geographical area(s) in which he/she is willing to work. Such on-site visits can provide a test of reality for many clients. For example, people who think they would like assembly line work may find themselves over-sensitive to the noise. Conversely, someone who has doubts about certain work may find him/herself becoming very enthusiastic about it.

## **4. Reading**

Clients should be strongly urged to read the following materials:

- Careers Provinces occupation descriptions,
- Careers Canada booklets on chosen and related occupational fields,
- Course description sheets,
- If the course is given at a community college or equivalent, then the client should review the calendar.

Many counsellors will also have information which would be useful to the client. The clients, in turn, should be encouraged to raise questions on the material they have read.

## **5. Individual Analysis**

The client should be requested to write down both the positive and negative aspects of:

- a) the training course
- b) the occupational choice



This can be in point form and can take just a few minutes but it will make both the client and the counsellor aware of areas of concern which should be discussed and resolved. This task can be especially important where the client has received a great deal of information in a very short time as often happens in last minute course recruitment. It is a chance for the client to catch his/her breath and identify his/her own value system as related to the occupational and training choices.

## **E – Areas for Decision Making**

The counsellor should discuss with the client the fact that any major decisions or new commitments will have an effect of some kind on other areas of life as well. If the client confronts potential problems and devises acceptable solutions or alternatives, then he/she will be better able to handle them if, and when, they do occur. Too many clients go on training and become overwhelmed by all that is expected of them. As a result, many give up in frustration and are back where they started except that their chances of going to another training course are reduced. This is an area where the counsellor must point out potential problems and solutions but should refrain from any value-laden judgments on the client's decisions.

### **1. Life Style Adjustments**

Going to a training course means reverting to the role of student, one that could have many negative associations for the client. What does this new role mean to the client in such areas as:

- social life?
- leisure activities?
- increased responsibilities?
- dress?
- geographical move?
- language?

### **2. Budget Consideration**

Every client should be required to complete a budget before going on training. In addition, if clients are on a wait list for more than six months, they should redo this exercise. The counsellor should review the budget with the client. Many banks and trust companies provide booklets on budgeting which will help the client. If a client has difficulty with this, the counsellor can suggest the use of Part E of PLACE.

If the analysis reveals that the client will not be able to live on the training allowance, then other options may have to be considered, including deferring training or using job experience programs.

Failure to realize the costs while in training is often a major reason for clients dropping-out of a training course.

A sample budget is included in Appendix A for the client's use.

### **3. Study Requirements**

Clients should research what the study requirements of a course will be. If a course places heavy emphasis on chemistry or electricity, the client might be encouraged to take a refresher course on his/her own time.

Further, the client should plan on when and where he/she could do the study required in a course. Commitments to doing work outside of class time will probably increase commitment to the course as well and further reinforce the role of being a student for the client.

Many clients may not realize that they are expected to work outside of the official class time and such research may bring reality home to them.

### **4. Family Responsibilities**

Many people have family responsibilities which have great importance to them, and which must be met. The client should examine how these responsibilities might affect their training programs. Examples are:

- **Mobility**

Do responsibilities prevent you from taking a course in another area?

- **Child Care**

Do you need to arrange for day-care, or after-school care?

- **Household Responsibilities**

How can you share your responsibilities, e.g., cooking while you are on training?

- **Emergency Help**

Who can you turn to for assistance if any emergency should arise at home?

### **5. Transportation**

The client will need to get from home to school. For many this will involve some logistics. Clients should figure out possible transportation alternatives and be able to explain them to the counsellor.

## **6. Time Management**

For many clients, a major problem will be time management. Clients should set up a brief time budget which indicates how long certain mandatory requirements will take and then allow for the planning of disposable time. This should include items such as departure time for school, class time, and at-home study time.

## **7. Family Reactions**

Clients must consider family reactions to what it really means to go back to school, e.g., reduced income, less free time and then decide how important these factors are and how they can be dealt with.

## **8. Contingency Plans**

Finally, the client should be encouraged to come up with contingency plans for “What if . . .” situations. A little preparation may prevent these problems from occurring and, if they do occur, the preparation might reduce their impact significantly.

## **F – Group Information Sessions**

One of the best ways to bring these areas to a client’s attention will be through group information sessions. Other clients going through the same decision-making process can be invaluable resources.

## **G – Summary**

This chapter re-inforces the need for a client to make a commitment at each of several stages of selection to training process. The counsellor’s role is to assist the client in the process and encourage him/her to take part in several activities which help assess the quality of the decision. The counsellor must help the client focus on various areas of his/her life which will be affected by the training decision. Finally, it points out that much of this process can be done through well-planned group information sessions. Appendix B provides examples of notes on client-counsellor decision-making process.



# Procedures for Referral to Training

## A – General Documentation

Chapter 24 of the Employment Manual documents how clients in various categories are referred to training.

### 1. Documentation for Canada Manpower Training Program (EMP 2270)

The client and counsellor must complete form EMP 2270 for all kinds of institutional training including apprentice training, work adjustment training and training of fee payers in receipt of U.I. benefits.

The EMP 2270 is used for the following purposes:

- a) To authorize a client to enter into a training course;
- b) To authorize District Services Offices to pay training allowances to eligible trainees;
- c) To authorize travel and commuting allowances under the provisions of the Manpower Mobility Regulations for eligible trainees;
- d) To make amendments, additions to any previously submitted EMP 2270;
- e) To establish a computerized data base for clients referred to training, from which data will be extracted for control, planning, evaluation and review of the program, as well as for research, and the formulation of Commission policy;
- f) To provide the training institution with referral information;
- g) To inform the U.I. agent of trainees' allowance entitlements; and
- h) To make training referrals under Section 39 of the U.I. Act.

### 2. CMTP Batch Control Record Form 3125

Form 3125, Batch Slip for CMTP, is used to record and control the transmittal of EMP 2270s from CECs to regional headquarters, and Course Purchase Notices from regional offices to national headquarters. They are submitted whenever a batch reaches fifty documents.

## **B – Documentation Procedures for Part-time Training or Short**

Documentation for part-time training consists of three elements: an application form for trainees, a CPN to document the course purchase and a Nominal Roll to authorize the trainee referrals.

A form EMP 2676 must be used if the trainee is to receive allowances, or if there are not a large enough number of courses of one type (e.g. Skill, “Apprentice”, etc.) to justify the use of the EMP 2224.

The final decision on selection of trainees must remain the responsibility of the employment counsellor.

Individual EMP 2270 authorizations are not required for part-time training or short courses and are replaced by a multiple authorization form EMP 2087. The employment counsellor will check the application forms and list on the Nominal Roll, form EMP 2087 (Nominal Roll Part-time Training) or its regional equivalent, those trainees eligible as an “adult” under the AOT Act, and whose occupation relates to the purpose of the course in the sense that the training is “suitable for that adult and increases the adult’s earning capacity or opportunities for employment”. A short course in this case is one of 10 days duration or less where no training allowances is provided.

## **C – Training Allowances**

- a) A training allowance related to family circumstances and living costs may be given to a client in an approved training course. The rate changes at periodical intervals (usually annually) and the counsellors should ensure that they use the most recent figures.
- b) A client who is eligible for U.I. benefits must receive it rather than a training allowance, irrespective of which is the greater amount.
- c) The eligible period for receiving unemployment insurance can be extended by the number of weeks of the duration of the course.
- d) When an adult in an occupational training course has an unexcused absence from the course, the training allowance will be prorated so that he/she does not receive the training allowance for the period in which he/she was absent.

## **D – Summary**

This chapter summarizes the forms to be completed in the referral process.

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## Other Options for Clients

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Frequently, the counsellor or the client will decide that training is not the appropriate option for the client at this point in his/her career. The reasons can vary from lack of relevant training to poor motivation by the client. In such cases, the good counsellor will propose other options to the client rather than leave him/her dangling in frustration. The most common options are explored in this chapter. They may or may not include the use of other CEC services. Client commitment to any one or to a combination of steps allows the client to feel that something is happening. Further, many of these options make a client's request for training much more likely to succeed at a later date.

Generally, counsellors can provide a number of alternatives to clients when training is not the most appropriate choice at that time. For example, arrangements can be made to have a client take the GED in order to provide evidence of academic equivalency level. Other typical alternatives are as follows:

- Maintain status quo
- Part-time education program
- Correspondence courses
- Full-time adult-only secondary school
- Full-time attendance at post-secondary institution as a fee payer
- CMITP
- Job placement
- Government-sponsored work experience programs
- Volunteer or non-salaried activities
- Relocation

### **A – Maintain Status Quo**

Any client who has many other problems which must be resolved before they are likely to succeed in training, e.g. family in emotional or geographical transition or encountering serious illness requiring extensive medical treatment should be encouraged to deal with these first before considering training. In this case, the client is encouraged to use a program such as PLACE in order to confront and resolve these problems. Training as an option should be deferred until the client is better able emotionally, physically or otherwise to succeed in training.

The probability of successful course completion is greatly minimized by competing demands which have higher priority for the client.



The counsellor should:

- Use a program such as PLACE to have the client identify specific problems and potential resources.
- Make referrals to appropriate community resources, e.g. welfare office, Alcoholics Anonymous, John Howard Society.

## **B – Part-time Education Program**

Part-time education program is any educational or training program taken by a client for less than 20 hours a week and which the CEIC does not sponsor.

Appropriate types of clients are:

- Clients on Wait List, especially when such training would increase chances of subsequent success.
- Clients whose previous training record is poor including course drop-outs.
- Clients who need the income of a full-time job.
- Clients who are not completely sure of occupational choices.

The rationale for choosing this option are:

- It can shorten subsequent training time.
- It increases the client's qualifications.
- It demonstrates client's motivation.
- Client can continue to maintain current standard of living.
- It provides the client with the opportunity to become familiar with requirements in the chosen occupation.
- It gives the client the chance to brush up on study skills where results of failure are minimized.

The client should contact local secondary school and community colleges. Courses are usually offered in day and evening sessions. Also some courses are given on television.

## **C – Correspondence Courses**

Correspondence courses are now provided using written material and cassettes. Clients who do not have easy access to the training institutions may opt for this process e.g. handicapped, hospitalized, residents of rural areas, prisoners, workers on rotating shifts.

The client can contact the provincial department of education for secondary school courses and community colleges or universities for post-secondary courses.

## **D – Full-time Adult-Only Secondary Schools**

Many municipalities have established secondary schools with complete programs whose students must be at least 18 years old or more.

This option:

- Allows clients a broader range of courses than that offered by BTSD especially for clients whose occupational goals have specific secondary school pre-requisites such as biology or languages.
- Demonstrates client motivation.
- Clients could continue part-time employment.
- Unlike regular school, all students are adults
- Useful for clients who want to complete secondary school but whose occupational goal only requires BTSD Level II or III.

## **E – Full Time Attendance at Post-Secondary Institutions**

Post-secondary institutions include community colleges, CEGEPs, technical institutes and universities which require secondary school graduation or equivalent for admission.

Clients with specific technical or professional occupational goals not provided under CMTP should consider this option because it allows them the following advantages:

- Allows clients to achieve stated technical or professional occupational goal.
- Clients can apply for student loans and grants.
- Can subsidize costs by part-time and summer employment.

## **F – CMITP**

Canada Manpower Industrial Training Programs allow the client to earn an income while getting job-specific training. It is appropriate for the following types of clients:

- Clients whose occupational goals can be achieved through CMITP.
- Clients requiring fast job placement.
- Clients who require concrete, immediate training.

## **G – Job Placement**

Job placement consists of placing the client in a job either on a full-time or part-time basis and is appropriate for the following types of clients:

- Clients with minimal chance of success on training.
- Clients with need for income.
- Clients already qualified for appropriate occupational goal.
- Clients who have been unsuccessful at previously sponsored training.
- Clients who don't meet admission requirements.

## **H – Government-Sponsored Work Experience Programs**

CEIC provides a variety of programs at any point in time that provide work experience at minimal pay. Their primary objective is to give people who suffer handicaps related to labour market integration, the opportunity to get current work experience. Their advantage is that their hiring standards particularly benefit those with some kind of work-related handicap. They are appropriate for:

- Clients with minimal or out-of-date work experience.
- Clients who have experienced great difficulty in obtaining work.



## **I – Volunteer or Non-salaried Activities**

Many activities can provide job skills which are directly transferable to the labour market. For example, working in a hospital auxiliary exposes someone to medical occupations. Similarly, many potential employers are willing to let someone work in their operation for a short time when it does not involve a salary. In this way, clients can obtain recent work experience and gain confidence which can be used to find paid employment.

They are appropriate for:

- Clients not in urgent need of immediate income.
- Clients with minimal relevant work experience.
- Clients with employment skills that need refreshing e.g. women returning to the work force.
- Clients who need to find out how to cope and adapt to problems associated with working e.g. day care.
- Clients who lack sufficient confidence in their work skills.

## **J – Relocation**

Often a client requests training because he/she can't find work in a selected occupation in the area where they now live. An examination of Job Bank printouts may provide opportunities for work if a client relocates. Many of the associated costs can be met through mobility grants.

## **K – Summary**

This chapter outlines many other options which can be presented to the client when CEIC sponsored training is not appropriate.

# The Apprenticeship Program

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## A – Responsibility for Referrals

Referral to apprenticeship is a special situation for counsellors. Typically, the client has already chosen a specific trade and only needs the counsellor to complete and approve the important paper work. Therefore, the counsellor would not normally go through the counselling sequence with a client who is specific in his/her demands. The primary reason for CEIC involvement in the referral process is that the CEIC pays 100 per cent of the provincial training costs of these classes as long as the training is not mainly for any level of public service employment (federal, provincial or municipal).

In order to be eligible for training, apprentices must be registered with the provincial Department of Labour in trades designated under the various Apprenticeship and Tradesman Qualification Acts. If a counsellor is unsure of these criteria, he/she should contact the provincial Department of Labour.

## B – Definition of an Apprentice

An apprentice is a person who is:

1. indentured under provincial legislation to a person, a company, or an organization authorized for that purpose and
2. employed (or on lay-off subject to recall) by an employer who has contractually agreed to provide approved training and opportunities to master a skill and
3. one year beyond the school-leaving age of the province in which he/she resides.

## C – Characteristics of Apprentice Training

1. Each occupation has a required length of apprenticeship. Usually this consists of at least two years or 3600 hours of reasonably continuous employment.
2. The training has two parts: on-the-job training and related technical classroom instruction.
3. Under CMTP, the classroom instruction must be approved by the province and usually does not exceed twelve weeks for each year of apprenticeship, with a maximum of 52 weeks for the total apprenticeship.
4. The provincial government must ensure that certain standards of training are met both on-the-job and in the classroom.

5. The apprentice must pass interim and final tests at the end of the apprenticeship period in order to achieve journeyman or equivalent status.
6. When an apprentice completes the training program successfully, he/she receives a journeyman or equivalent status.
7. For a number of trades, journeymen can write “Red Seal” exams which allow their certificate of training to be accepted anywhere in Canada.
8. In all provinces and territories there are provisions made to allow for a reduction in the apprenticeship term dependent on the training and work experience that an individual has had before becoming a registered apprentice. These allowances for previous training and experience vary from province to province and are usually determined on an individual basis. They are usually dependent on approval of the employer.

## D – CEIC Responsibilities

Most of the administration training and monitoring related to apprenticeship is the responsibility of the Director of Apprenticeship in each Department of Labour (or equivalent) and of the Department of Education in each province.

The CEC counsellor assumes that the client has made a career decision and completes referral procedures to ensure CEIC sponsorship and to initiate training allowances or to establish UI claims. Section 29.25.1 of the Employment Manual deals with the specifics of claimant trainee referrals.

## E – Ellis Chart

A very useful tool for counsellors is the *ELLIS Chart* which is a table whereby provincial programs can be compared. It is available from the Training specialists in each region. The table includes credits on apprenticeship as well as the details on training for each apprenticeship program available in each province and territory.

## F – Occupational Analyses Series

The Occupational Analyses Series is another useful tool for counsellors. Each of these booklets provides a detailed description of the tasks involved in a particular occupation. The analysis of each occupation is always reviewed by a detailed panel of experts before publication and includes a listing of interests, aptitudes, tools used, and working conditions.

## G – Summary

This chapter describes briefly the apprenticeship program.



## Ongoing Counsellor Contact with Client

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One of the most difficult activities for a counsellor is to maintain contact with a client over an extended period of time. The reasons for difficulties in this area can include the sheer number of clients, changing responsibilities, or poor communication with the training institution. However, for the client, such situations may make him/her feel like a thing or a number rather than a person.

### A – Necessity for Continuing Contact with Client

There are two basic reasons for maintaining contact with a client:

1. To provide complete service to the public whom the CEC is designed to serve.
2. To maximize the use of the CEC resources, especially financial.

Both of these are of great importance but may become buried under the crush of more immediately observable priorities. It is not unusual for a counsellor to discover, much after the fact, that a client has dropped out of inappropriate training and that nothing further has been done to assist him/her.

The counsellor should remember that monitoring a client's situation is all part of the selection and referral process.

There are two periods during which monitoring is very important: the first occurs when the client is on a wait list and the second, while the client is actually on course.

### B – Clients on a Wait List

Current practice in most regions and individual CECs is to send a post card to clients to determine whether or not they are still interested in going on the selected course. This, at least, helps to maintain the accuracy of the wait list.

However, it ignores the fact that many clients may be facing major changes in their lives. It is a common occurrence that clients who have been on a wait list for a number of months may simply forget much of the original briefing which they received and, therefore, find themselves very shocked when they actually begin the training course. On-site counsellors constantly have to deal with the trauma of the new students and try to help them come to terms with the problems being faced.

When clients have been on a wait list for longer than six months, counsellors should meet with them again immediately prior to the commencement of training.

At this session, the counsellor and client should review:

- a) commitment to training
- b) commitment to occupational goal
- c) changes in major life role responsibilities
- d) client's budget while on training
- e) coping responses to problems which may affect success in training
- f) any other problem which may be of concern to a client.

Such a brief counselling session could have tremendous pay off for both the client and the CEC. It will help the on-site counsellor who can then work with a client who has a realistic perception of his/her situation and whose concerns have been explored.

Counsellors should ensure that clients are aware of what their responsibilities are while on the Wait List. This may vary from region to region where, in some cases, the primary responsibility for maintaining contact is the CEC's and in others it is the client's.

## C - Clients on Course

Traditionally, once a client commences a course, the only information on a client comes from college notices on client drop-out. It is not unusual for such notices to be a number of months old before the authorizing counsellor processes the information. This does not help either the client or the counsellor. Without feedback there are two potential problems:

- The client may be left to flounder or to give up attempts at improving his/her qualifications.
- The counsellor does not receive feedback on ways to improve his/her method of doing selection and referral. Frustrated clients will be more than happy to explain what they perceive as having gone wrong.

There are three reasons for maintaining some kind of contact with a client on course. Frequently, the most efficient way will be through the on-site counsellors or student placement services. In this case, the responsibility for a client may become transferred while the client is on course. The responsibilities to the client include:

### **1. Monitoring Progress and Problem Resolution**

Monitoring of the progress of all clients is an ideal. Unfortunately, because of time constraints, it is not likely to be achieved. However, counsellors should monitor those clients for whom they have the greatest concern. Liaison can be established with an appropriate member of the training institution to provide regular feedback to the counsellor. For a client whose motivation is questionable or who is experiencing problems in adapting to the student role, such monitoring and actions by the counsellor may help the client to resolve the problem and complete the training successfully.

### **2. Focusing on Career Goals**

For many clients, the first stage of training does not include specific training for an occupation e.g. BTSD, WAT. Therefore, as the client's general qualifications begin to improve, it is necessary to review goals with a client. Frequently, as a client either gains a more realistic self-perception or gains confidence, earlier goals will need to be revised.

### **3. Marketing Plans**

As a student-client nears completion of a course, the client and counsellor need to commence marketing plans. This could include plans for taking a CJST course, drafts of resumé, completion of application forms, use of Job Clubs, identifying potential employers, and reviewing of National Job Bank lists. In summary, it involves gearing the client up to the job placement process.

## **D – Summary**

This chapter focuses on the necessity for a continuing contact between the client and the counsellor in order to maximize CEC service to a client. Clients on a Wait List have a special need to review their status immediately prior to beginning a training course. Clients on course may interact with on-site counsellors but some counsellor should have the responsibility for a client – especially for those clients who are most likely to encounter problems.



# Recruitment for Courses

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## A – Need for Course Recruitment

Recruitment to courses involves the solicitation of active or potential clients in order to fill the seats on a course. There are two types of courses on which recruitment is required.

### 1. New courses

Typically, both counsellors and clients are unaware of the introduction of many new courses. As a consequence, there is insufficient registration to make the course economically feasible. For new courses, active publicity and a search for students who have indicated an interest in this or a related area is a necessity.

### 2. Existing Courses

Occasionally, a surplus of spaces may be evident in existing courses. Often, there are many clients who would be interested in taking such courses if the courses were brought to their attention.

Where there are available seats on a course, counsellors should bring it to the attention of those clients whom they judge would benefit from the course.

## B – Internal Recruitment

The most typical kind of recruitment for a counsellor will be internal to the CEC, that is, with clients who are already requesting CEC services. If a counsellor is notified of vacancies in a course, there are three ways recruitment can be done. Frequently, all three will be conducted simultaneously.

### 1. File Search

A review of active files will often reveal the name of clients who have expressed interest and who have the ability for the kind of training which is being offered. They may not have been on the current registration list for any number of reasons including the fact that they were taking WAT or perhaps did not feel ready to commit themselves to training before this time. The counsellor who is working with fully documented files will likely be able to identify some clients who might otherwise be passed over.

**Caution:** The objective of the file review is not simply to fill vacant seats. It is to ensure that clients who are now ready for training are included in consideration for available opportunities.

## 2. Recommendation to clients

Often, clients have narrowed their occupational choice down to one specific occupation and are on a wait list for the required training. However, counsellors can identify those clients whose occupational goals are closely related to what is immediately available and recommend to the client that he/she take the course which has the vacancy. A major reason for such a recommendation is expediency; that is, the client has the opportunity to be trained in a chosen area and to be working much sooner than if he/she waits for the first choice of courses.

**Caution: Counsellors should not recommend a training course to a client unless the AOT criteria can be met.**

## 3. Posters in the CEC

Another method of recruiting for a course consists of bringing the information to the attention of potential students. The easiest way is to design a simple, neat announcement containing the essential details of the course. The interested clients are then invited to discuss the course with a counsellor.

**Caution: CECs have received criticism from reviewing groups because of the poor quality of the notices and the haphazard way in which they have sometimes been attached to notice boards. Care should be taken to do the notices of course vacancies in as professional a manner as possible.**

## C – External Recruitment

External recruitment is more typically used for brand new courses. It is used to bring knowledge of the courses not only to clients but also to the attention of referring agencies in the community.

### 1. Community Contacts

Usually district and regional counselling and training specialists know the agencies in the community to whose attention vacancies in new or existing courses should be brought. Individual counsellors should also ensure that notices of the course are sent to their own community contacts.

### 2. Media Advertising

One of the more expensive ways of doing course recruitment is advertising in the media.

- It includes:
- a) Notices in local newspapers
  - b) Public service announcements on local radio and television
  - c) Short reviews and stories in local newspapers.

The advantage of this approach is that it brings the course to the attention of a much greater variety of people, including people who are hesitant about approaching the CEC or who are not aware of training opportunities. Because of this, media advertising may have a much broader pay-off. Counsellors should not hesitate to recommend media advertising where it appears to be appropriate.

## **D – Caution Against Arbitrary Seat Use**

Recruitment of clients who have not yet been identified for an appropriate course is very different from simply filling a seat. Counsellors should not respond to a request for active recruitment by simply giving names of people who have requested training. This may have very negative consequences for such uncounselled clients. The counsellor must exercise his/her major responsibility to the client and resist any pressures which are counter to this responsibility.

## **E – Summary**

This chapter explains the rationale for recruitment for both new and existing courses. It outlines how internal recruitment can be done through file searches, recommendation to clients and posters in the CEC. As well it shows that external recruitment can be done through direct contact with other community agencies as well as through media advertising. Throughout, the content of the chapter reinforces that active recruitment is not simply arbitrary filling of empty training seats.



## Feedback on Course Demand

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### A – How Courses are Established – The Forecasting Process

The objective of any course is to provide training in those occupations for which there are insufficient workers. Generally, representatives from both provincial and federal governments provide input on the establishment, expansion, reduction or elimination of courses in each region. Ordinarily, regional economists (as well as district economists in large regions), review the labour market at regular intervals. They review data from industries and employers as well as from COFOR to determine human resource needs. An important source of input comes from the CECs who communicate identified labour shortages and need for specific courses. Input from the CECs is essential to develop an accurate picture of the actual usefulness of courses being offered in each region.

From an analysis of all this information, each regional economist identifies patterns of supply and demand in terms of both occupations and geographical regions. This report is then forwarded to the regional Manpower Needs Committee, where it exists, in a particular region and to the Director General of the region. This committee, then, has the responsibility to recommend a training plan to each regional headquarters.

### B – Recommendations for Changes in Courses

An essential element in course negotiations is the feedback from counsellors. Funds for training are not committed for the full year. Therefore, if counsellors realize that certain courses are simply not suitable for whatever reason, they should inform regional training people who can cancel the course. In the same way, the training staff can sometimes arrange to have a new course established quickly.

A constant complaint of counsellors is that their feedback is ignored. In fact, what they may not realize is that there is a time lag as information is processed and adjustments are made to courses. Counsellors should remember that their input is essential in making the system work and should continue to pass on their own knowledge and perceptions.

## Human Rights Legislation

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The Canadian Human Rights Act prohibits discriminatory practices based on race, national or ethnic origins, colour, religion, age, sex, marital status, conviction for which a pardon has been granted or physical handicaps. Counsellors must be careful not only of discriminating but also of being perceived as discriminating. This is often difficult when so many things are ingrained into our value system and expressed unconsciously in one's manner of speaking. For example, some counsellors automatically assume that the head of a household with two adults must be the man. Or that women just do not want to work away from home for long periods of time. Most of us operate on a host of assumptions which can make for efficiency because we don't have to think about decisions all the time. But assumptions which are not examined critically can lead to unconscious discrimination. This is often most evident in the kind of information which a counsellor supplies to the client.

Under the Human Rights legislation, there are 17 areas of concern with which a counsellor should be familiar when interviewing a client. All CEIC forms are being scrutinized to ensure that they do not violate the law. Much of the following information is contained on both the EMP 2270 and the EMP 2294. However, the client does not have to provide it unless he/she chooses to do so. Only after the selection is made without influence by these factors can the counsellor require the client to provide the information in order to confirm that the client meets the essential selection criteria.

The areas which are covered are:

### **1. Name**

It is not acceptable to ask the maiden name of applicant or to inquire as to previous name, if changed by court order or otherwise. However, previous name(s) under which applicant has been educated or employed can be asked.

### **2 Address**

It is not acceptable to inquire into foreign addresses which may indicate national origin. Questions on place and duration of current and previous address in Canada are permitted.

### **3. Age**

It is not acceptable to require birth certificate or baptismal record or any other information regarding age of applicant. However, counsellors can ask if the applicant has attained minimum age required in that region for referral to training. Verification of age may be obtained after the selection decision has been made.

**4. Sex**

It is not acceptable to inquire as to sex or to use different or coded application forms for males or females. Clients can also ask that any correspondence may be addressed to their homes without the prefixes of “Mr., Mrs., Miss, Ms” e.g. Dear Mary Smith.

**5. Marital Status**

It is not acceptable to make any inquiry as to:

- whether applicant is single, married, remarried, engaged, divorced, separated, widowed, or living common law,
- applicant's spouse e.g. “Is spouse subject to transfer?”,
- number of children or other dependents,
- inquiry as to child care arrangements,
- whether applicant is pregnant, is breast feeding a child, on birth control or has future childbearing plans.

It is acceptable to ask the client if he/she is willing to move in order to take training or to go to locations where there is related work. In addition, the counsellor can suggest that if situations exist such as having dependent children, the client should consider how they might be taken care of. After selection has been made, the counsellor can also ask about spouse and family status in order to determine training allowance.

**6. National or Ethnic Origin**

It is not acceptable to make the following inquiries:

- birthplace;
- nationality of parents, grandparents, relatives or spouse;
- ethnic or national origin e.g. birth certificates, mother tongue;
- native born or naturalized;
- date citizenship received;
- proof of citizenship.

The counsellor can ask if the client is legally entitled to work in Canada. After the selection process decision is made, documentary proof can be requested.

**7. Military**

It is not acceptable to inquire into any military service other than Canadian unless such military experience is directly related to the job for which the client wishes to become qualified.

**8. Language**

It is not acceptable to ask what the client's mother tongue is or where language skills were obtained. Questions as to which language a client speaks, reads or writes can only be made if relevant to the planning of the training program and will be a requirement of the work to which a client aspires.

**9. Race or Colour**

It is not acceptable to make any inquiry which would indicate race, colour, complexion including colour of eyes, hair or skin.



**10. Photographs**

Counsellors cannot request that a client provide photographs.

**11. Religion**

It is not acceptable to make any inquiry as to religious affiliation or willingness or availability to work on a specific holiday. It is also not acceptable to ask the church attended, religious holidays, customs observed or religious dress or to request reference or recommendation from pastor, priest, minister, rabbi or other religious leader. Counsellors can ask about willingness to work a specified work schedule. Once the selection decision is made, the counsellor can then ask questions to ensure that the religious observance of the applicant can be accommodated whenever it is reasonably possible to do so.

**12. Physical Handicaps**

Inquiries into all physical handicaps, limitations or health problems (this would tend to elicit handicaps or conditions which are not necessarily related to job performance) are not acceptable. However, counsellors can and should ask as to whether applicant has any physical handicaps or health problems affecting the occupations which are being considered, or which the client would like to take into account when making decisions about the training institutions or future job placement. As a guide, counsellors should be aware that a physical handicap is relevant to the job if:

- (a) the handicap would be hazardous to the safety of the applicant, co-workers, clients or the public;
- (b) the handicap would preclude the applicant from performing the duties of the job satisfactorily. One of the most typical handicaps about which the counsellor should investigate is colour blindness for those occupations where a vision test is required.

**13. Organizations**

Counsellors cannot request that applicants list all clubs or organizations to which he/she belongs unless membership in a particular organization is necessary to determine job qualifications.

**14. Height and Weight**

Height and weight requirements may be discriminatory if they screen out disproportionate numbers of minority group members or women and cannot be shown to be essential to the performance of the job.

**15. Relatives**

While it is acceptable to ask the name and address of a person to be notified in case of emergency it is not acceptable to ask for next of kin or to ask the relationship of the person named.

**16. References**

Counsellors cannot ask anything of a person serving as a reference which would not be allowable if made directly to the applicant.

**17. Criminal Conviction**

The Canadian Human Rights Act prohibits discrimination based on criminal conviction for which a pardon has been granted. The Commission discourages inquiries into unpardoned criminal convictions unless the particular conviction is relevant to job qualifications. For example, theft and fraud convictions are relevant to a job requiring honesty, but marijuana possession is not.

## Questions and Answers on Counsellor Dilemmas

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During the development of this text, many questions related to the selection and referral process were raised by counsellors. This final chapter attempts to provide answers to these queries.

1. *"Is CEIC-sponsored training a right or a privilege?"*

Neither. It is a service of the Canada Employment and Immigration Commission which is to be provided to those eligible clients so that they can develop occupational skills that not only are likely to improve their employability or earning capacity but which also are required in the Canadian labour market.

2. *"Who has the responsibility for selecting someone for training?"*

Because it involves his/her own life, the client has the responsibility for deciding on a commitment to a training program. However, only an authorizing CEC counsellor has the power to refer a client to training which is sponsored by the CEIC.

3. *"What happens if a counsellor decides that training is not appropriate for a client?"*

If the counsellor decides that training is not appropriate, then the counsellor and client should explore other options for a client including part-time studies and job placement. In no case should a client be left to flounder without being encouraged to take action in certain specified areas.

4. *"What recourse does a client have if the counsellor refuses to authorize training that he/she wishes to take?"*

The client can appeal to the supervisor or CEC Manager. However, if the counsellor has documented the decision carefully, then it should stand when reviewed by the supervisor or manager.

5. *"Why should the CEIC provide training for clients who already have jobs?"*

Under the AOT Act, employed clients can be eligible for training if such training would increase their earning capacity or their opportunities for employment. It is in such situations that the authorizing counsellor is called on to make a judgment. If a client is in a dead end job and appears to have the potential to move into a growth area, then he/she should be considered for training. But if the client has already received training and has no very strong reason for change, then the counsellor might not wish to authorize training. Counsellors, however, should beware of taking their role as guardian of the public purse so strongly that they rarely authorize training, especially for currently employed clients.



6. *"More and more, we are seeing university graduates asking for skills training. This doesn't seem right!"*

Again, counsellors must remember the function of the AOT Act. Many university graduates, especially those in the liberal arts, simply cannot find work or are seriously underemployed. As an example, experienced teachers are also being forced into mid-life career changes. These people are excellent candidates for training in areas of labour shortages. In the 1980s, Canada faces major shortages of skilled labour and these clients are ideal candidates to meet the demand.

7. *"Many refugees coming into Canada are illiterate and often unskilled. Sometimes, they find it impossible to learn either English or French while on language training. What do we do?"*

Clients in this situation should be encouraged to remain on language training for the maximum period of time and to be exposed to different teaching methodologies. In addition, the counsellor should contact community resources such as the local volunteer immigration service who can provide further support for the person. If no progress is made, the counsellor should attempt a job placement which demands little in the way of language skills. In the larger cities, such jobs are often found in or through client's own ethnic community and the counsellor should not hesitate to use these contacts.

8. *"The idea of recurrent training has a lot of merit but what do we do about the client who seems to have become a permanent student?"*

It is the responsibility of the authorizing counsellor to justify that further training would be beneficial both for this client and for the overall labour market. A review of the client's career goals should help the counsellor decide.

9. *"The training program is so expensive. Wouldn't one way of reducing costs and drop-out be to take the "cream" of the clients who ask for training?"*

Yes, it probably would work. However, such an approach is not in keeping with the guidelines on selection and referral to training which state quite clearly that a client should be referred to training if the counsellor judges that the client has a *reasonable* chance to complete the training successfully. This guideline is clear that, while on the one hand, counsellors should not grant all requests for training, on the other hand, they should not refer only low-risk clients.

10. *"In many cases, it seems that the chance of a client to go on a training course is highly dependent on the philosophy of the counsellor whom he/she sees. How can clients have equal chances at being considered for employment?"*

This is a very serious problem because the AOT Act is very specific that all clients have equal rights to be considered for training and that their selection should be based on the characteristics of the client. Regional training specialists and CEC managers should reinforce this concept with all counsellors.

11. *"As a counsellor, I get confused in figuring out what income support my client will receive while on training, especially when he/she will be receiving support from other sources such as Workmen's Compensation, Rehabilitation, Indian and Northern Affairs and Unemployment Insurance."*

To calculate a client's training allowance, follow the instructions in chapter 29 of the Employment Manual. A client cannot receive unemployment insurance and a training allowance simultaneously and is generally better off receiving unemployment insurance. If he/she is eligible for U.I., they must take U.I. benefits with the exception noted in the following question.

12. *"I have heard that someone can become eligible for U.I. benefits while on training. How can this be possible?"*

Someone on CMTP may work part-time for up to 24 hours a week. Additional entitlements are accrued from this work time. However, this does not affect the income support received by the client through allowances, unless the rates of U.I. for which the person becomes eligible are higher than the CMTP allowance that he/she is currently receiving. If the client continues to work he/she will continue to receive a training allowance. If they stop working but continue taking the training program, they are then eligible to receive unemployment insurance benefits.

13. *"For a long time clients have been chosen for skill training by a joint selection committee which included members from CEIC as well as the provincial government. Is this an acceptable practice?"*

Absolutely not. Only an authorizing counsellor can make the decision to refer a client for training. However, a counsellor can use the advice and recommendations of a Joint Assessment Committee to come to the decision of whether this training program is suitable for a client.

14. *"What is the difference between a Joint Selection Committee and a Joint Assessment Committee?"*

The main difference between the two is the recognition that under the AOT Act only the authorizing CEC counsellor can actually select someone for training. In many places, a joint selection committee evolved with members from CEIC, provincial departments, training institutions and elsewhere. They reviewed candidate files and decided who should be accepted for training. Often non-CEIC committee members made the actual decision. This process is contradictory to the AOT Act and policy guidelines on selection and referral.

15. *"Well, then, what is the correct function of the Joint Assessment Committee?"*

The function of the Joint Assessment Committee is to provide advice and recommendations to the authorizing counsellor on whether or not a client should be referred to training. Each region organizes the Joint Assessment Committees in a slightly different way. Members include CEIC personnel who typically are the authorizing counsellor and/or CMTP co-ordinator and non-CEIC representatives such as teachers from the training program, provincial labour department representatives and employers of workers skilled in this area. They can review the individual files and make recommendations to the authorizing counsellor who, in turn, can decide to accept or reject the recommendation.

16. *"Does the recommendation of the Joint Assessment Committee negate the 'first-come, first served' policy?"*

Not at all. The Joint Assessment Committee can review the files of several candidates at one time. However, if clients are recommended for training by this group and referred by the authorizing counsellor, then the priority of referral is determined by the date on which the authorizing counsellor actually refers a client to a specific training space. Where Joint Assessment Committees are used, this referral comes after the meeting of the committee.

17. *"How is the priority on a wait list established if several names are referred on the same date?"*

If names for referral to training are received with the same date of referral then within this group, priority is established by using the date of the first request to the counsellors by the client for training.



18. *“What happens if there just are not enough spaces for all the clients who are referred to a course?”*

In the short run, clients are put on a wait list. Counsellors can also refer them to courses in closely related areas in which the client is also likely to succeed. In the long run, counsellors should ensure that feedback on high demand for a course is provided to the training specialists in each region.

19. *“Many clients who request training have a “shopping bag” approach; that is, they want training in several very different areas. How does a counsellor deal with this?”*

This goes right back to the very first step in the counselling process of finding out exactly what it is that the client wants and then identifying the characteristics of a client. From that, the counsellor should guide the client into a sufficient self- and career-exploration that the options become more feasible.

20. *“Earlier in this text it says that referral to BTSD and Skill Training can be done at the same time. In our region, I thought that it was policy that a client could not be referred to skill training until he/she had already completed BTSD. Can I now refer clients to two or more courses at the same time?”*

Yes. In fact, it is recommended that the client be referred to all courses in his/her training plan at the same time. This eliminates the need for a client to search for temporary employment in between courses and minimizes the upheaval in his/her life. It may also contribute to the motivation of the client to complete each section of the training program when the goal is more firmly in view.

21. *“What happens to a client who is referred to a skill course at the same time as to the BTSD course but who changes occupational goal while on BTSD?”*

If the authorizing counsellor (who may be the liaison counsellor) agrees to the change, the client can be placed on the wait list for the new course. However, the date of referral is based on this new date of referral and not on the original date of referral used before the training program commenced.

22. *“How can a counsellor monitor a client who has taken training in a variety of locations but who does not admit to it?”*

At the present time, this can be very difficult. The counsellor should ask the client to name the CECs to which he/she has gone for previous service and then request the client's files. However, this does not guarantee that any client who wishes to practice deception will be caught. On the other hand, based on the average age of most people going into training, such deception would not be a very widespread problem.

23. *"In our region, there are a number of one-week and two-week courses e.g. woodworkers, fisheries and agriculture courses. Usually, the training institutions have certain pre-requisites which potential students must meet. Just how much does a CEC counsellor have to be involved with selecting and referring clients to such courses?"*

Occupationally-specific courses paid for by CEIC are often designed to meet very specific needs in the community and often the representatives from Agriculture Canada, Fisheries Canada and their provincial counterparts are more aware of who would benefit most from these courses. In addition, clients will not receive any training allowance for the courses – only free tuition. And they intend to return to an existing area of work. Complete documentation is not necessary in most regions. Usually, most regions will accept the counsellor's signature on the nominal roll which is completed by the training institution. This eliminates the need for clients to come to the CEC and individually complete the usual referral-to-training forms. Counsellors who are involved in referring clients to these kinds of courses should contact regional training specialists to learn what procedures are followed in their own region. The CEC counsellor still has the responsibility of authorizing training for every client who is recommended to the course and does not have to accept the recommendations of the training institution or industry representatives.

24. *"What can be done to help a client who has quit a job on the counsellor's advice that the course was to begin very soon when in fact it did not?"*

In such cases where the client is experiencing economic hardship because of the wrong advice given by the counsellor to quit a job, *ex gratia* payment can be authorized by the regional headquarters to provide an income supplement to the client until he/she can either get a new job or go on training.

25. *"Are people on social assistance treated differently when being referred to training?"*

Welfare clients are eligible to go on training as long as they meet the same criteria as any other CEC client. It is important for the counsellor and client to know that as long as the proposed training allowance is less than the welfare benefits which the client receives, he/she remains eligible to continue to receive welfare benefits while on course. He/she is also eligible to receive benefits equivalent to the difference between the training allowance and the pre-training level of welfare benefits. If the local welfare office refuses to do this, the client has the right to make an appeal to the provincial welfare appeal board or equivalent. This can be very important in those situations where the client would be much better off financially if he/she could retain eligibility for welfare and its associated benefits such as free medical and dental care.



26. *“What is a “conditional referral to training”?”*

A counsellor can authorize a client to go on training on the condition that he/she be available to take a job at any time, even when that would mean dropping out of a training program in which he/she is already enrolled. This option is open to those clients who are receiving unemployment insurance and protects their eligibility to receive it. This is covered under Section 25 of the Unemployment Insurance Act.

27. *“Can clients choose to pay for their own training and still remain eligible to receive U.I.?”*

Yes. U.I. claimants may be referred to non-CMTP courses as “fee payers” but in order to remain entitled to U.I. benefits, they must be referred by a CEC counsellor. Usually, this requires the approval of regional headquarters.

28. *“What does “continuous service” mean in terms of training?”*

Continuous service involves providing service to clients from the time they first approach a CEC, throughout the selection and referral process, liaison service while on course, and assistance in finding a job once the course is completed or after the client has terminated the training program. It means that the client is never left to flounder helplessly and is kept informed of what his/her options are at any one time. The emphasis throughout this period is on providing quality of service, because a high quality of service ensures the best return on Canada's investment in course purchase for and income support of the trainee. To the greatest extent possible, this service should be personalized. Because of the limitations of resources, it applies only to those CMTP client trainees whose course of instruction leads directly to employment. In general, those involved in providing continuous service are the authorizing counsellor, the liaison counsellor and the employment counsellor to whom the trainee's Master Registration form is assigned after course completion.

29. *“Doing all the self and career exploration with a client sounds great but as a counsellor in a CEC I just don't have the time. How can I do a good job with the client in the time that is available?”*

The following steps, when used together, should allow the counsellor to maximize his/her use of time.

1. The counsellor should continually improve his/her own counselling skills. Regional counselling specialists can provide training and materials to help counsellors.
2. Put the client to work. After all, it is his/her life. Encourage him/her to complete tasks, exercises or activities in his/her own time e.g. if a client completes the ICO, a great deal of interview time can be saved.



3. Know what tools and programs are available and how and when to use them. e.g. clients with little knowledge of the world of work could be given a few sessions on the CHOICES terminal. Sometimes tests will save time. Use what is required.
4. CEC counsellors should remember that they are employment counsellors and not clinical counsellors. Make referrals to other community services when it seems to be appropriate.
5. Don't get discouraged

# Appendix A

## How to Prepare Your Budget

Preparing a budget often sounds complicated. In fact, all it means is that you know how much money you have coming in and how much you have going out. Most people never prepare a budget because they think that it is just too time consuming. But it is like many other things. If you take the time now to think through your budget, you can save yourself a lot of problems later on – especially if you are going on a training program when your income may be greatly reduced. Follow the steps outlined below and you will be able to begin your training program with a much more realistic point of view.

### Step One: How much money do you have coming in?

The first step is to identify how much money you have coming in. On *Part A: Income* of the budget form, write down your net earnings – the amount of money that you actually get to take home from your pay. If your spouse or living partner also contributes income available for joint use, mark that down as well. Next, mark down any other sources of income you may have. Total this column. This is what you are now living on. Move to the next column. Here you must make a prediction of how much you will have to live on once you begin your training course. Perhaps you plan to have a part-time job; if so, how much money will you clear? How much will you get from unemployment insurance or a training allowance. If you don't know, ask your counsellor. What other income will you have? Now total this amount. What is the difference between what you now have coming in and what you will receive while on course? This amount is important when you come to figure out how much you may have to cut back in your expenses.

### Step Two: What are your expenses?

Most people have twelve major areas of expenses. The first thing to do is to review each of these areas and identify just how much you now spend in each area. You may want to use your cheque book and bills to find out the totals because people usually remember very little about where their money actually goes. Also, your spouse or living partner can help you here. Total this column and this will tell you how much you have spent in the current month. Now, you will have to estimate what these expenses will be while on course. Go through each item once again and ask yourself such questions as “Will I have to pay rent on my home as well as on a place to live near the campus?” “Will I have to eat in restaurants on a regular basis?”

### Step Three: Planning your budget while on course

Your next step is to make some realistic decisions about how to handle your money while on course. If you can, prepay as many regular expenses as possible such as car insurance. You will have to think about what bills and expenses can be deferred while you are on course. For example, could you save money by going to fewer movies and by making your own meals more often. Total up this column. You must make changes in your planned budget until the total you plan to spend is equal to or less than the amount of money that you will be receiving. Remember, it is important that you do not reduce your budget so much that it becomes unrealistic. But you may want to come up with substitutes and ways of reducing costs. The following are some suggestions to help reduce your expenses.

#### Hints to help your budget

- Carry your own lunch to school
- Share rides with other people
- Put off buying any new clothes
- Cut back on buying magazines
- Watch for specials in the newspapers for groceries
- Trade your own work for something that you want e.g. babysitting
- Rent a plain black dial telephone instead of a coloured telephone
- Ask for a party-line phone rather than a private line
- Take out your cablevision line
- Conserve electricity
- Wear a sweater rather than turn up the heat
- Make your gifts instead of buying them
- Cut back on the number of times that you either eat out or order in food
- Pay off any outstanding loans or credit card balances before you begin training
- Find out if your training allowance makes you eligible for any special benefits such as subsidized housing, medical insurance, free prescription drugs
- Do without

**Caution:** You should be prepared that the U.I. cheques and training allowance cheques are often slow. In fact, the first cheque could be delayed. Have some money saved to help you cope during this period.



# Budget

NAME \_\_\_\_\_

Date Prepared \_\_\_\_\_

This budget will help you plan to pay your living expenses while on training. It reflects how you like to live and what bills you must pay. No one will have exactly the same budget because each of us has different incomes, commitments and choices. However, it is important that you figure out your own budget. Most people have little idea of exactly how they spend their money. And when their income is sharply reduced, as it sometimes is by going on training, then they have no idea of how to get by. You can help yourself succeed by doing a little advance planning. Just follow the instructions. And if you have a problem, talk to your counsellor.

Part A: Income	Current Month	Month While on Course	Difference
Net Earnings (self, spouse or living partner)	_____	_____	_____
Unemployment insurance or training allowance	_____	_____	_____
Family allowance	_____	_____	_____
Other e.g. Workmen's Compensation	_____	_____	_____
	_____	_____	_____
Total	_____	_____	_____

Part B: Expenses

1. Accommodation

Mortgage or rent	_____	_____	_____
Housing repairs and maintenance	_____	_____	_____
Hydro electricity	_____	_____	_____
Heating costs e.g. gas, oil, wood	_____	_____	_____
Water	_____	_____	_____
Telephone	_____	_____	_____

2. Food and Housing Supplies

Groceries	_____	_____	_____
Meals at restaurants, take-outs, etc.	_____	_____	_____
Cleaning and household supplies	_____	_____	_____

3. Money

Spending money	_____	_____	_____
Payments on loans	_____	_____	_____
Payments on credit cards	_____	_____	_____

4. Insurance

Hospital and medical insurance	_____	_____	_____
Car insurance (1/12)	_____	_____	_____
House or tenant insurance (1/12)	_____	_____	_____

5. Medical Expenses

Dental bills for self and family	_____	_____	_____
Medical needs e.g. prescription drugs, glasses, dentures, etc.	_____	_____	_____

6. Taxes

Income tax	_____	_____	_____
Property tax (1/12)	_____	_____	_____

7. Travel Costs

Gas, oil and parking	_____	_____	_____
Car repairs	_____	_____	_____
Bus and subway costs	_____	_____	_____
Car pool costs	_____	_____	_____

## 8. Entertainment

Personal entertainment, e.g. movies,  
parties, "night out"

### Hobbies

Cablevision

## Babysitting

## Newspapers and magazines

Gifts to others

### Tobacco and alcohol

Holidays

## 9. Clothing and Personal Care

## New clothing

Cleaning and repairs e.g. coin wash

Haircuts and hair care

## 10. Family Care

Day care while at work or school

## 11. Course Requirements

## Books and study supplies

### Required tools and equipment

Required special clothing

## 12. Other expenses

List \_\_\_\_\_

Total

## Summary

	Current Month	Month While On Course
A. Income	_____	_____
B. Expenses	_____	_____
C. Difference (A minus B)	_____	_____

To balance your budget, B must be less than or equal to A.



## Appendix B

### Sample Client Referrals to Training

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#### Sample 1

##### Notes for file

**Client:** John Drouin

**Counsellor:** R. McLean

First Meeting: September 14, 1981

Client came in with request for training of some type in order to have more stability in his career. Reviewed EMP 2270 with him and helped him to complete it as his literacy skills are not very high.

*Work History:* Most recent experience is as light truck driver doing deliveries which he really enjoys. Has lost most jobs either because they were seasonal or because of business slowdowns. Other jobs have been as general labourer which he does not want to work at anymore. He does not really want to work inside but he does want some protection from the weather. Says his bosses have always liked him and there were no complaints from customers.

*Academic Status:* Completed grade eight but does not read much. No other training except what he has picked up on his own.

##### **Social and Economic Factors.**

Currently lives in subsidized housing. Wife babysits and two of the three teenage children have part-time jobs.

\*Client asked to complete Budget exercise.

Leisure activities seem to revolve around driving with his family. Won't watch television. Loves to talk, especially on the telephone and enjoys meeting people. Had a drinking problem a number of years ago but stopped when he married his present wife.

## Occupational Goal

Wants a job with security that he could keep long enough to build up a pension. Does not mind hard work, prefers not to be cooped up inside. Does not want to have to take a long training period. Decision to try CHOICES\*.

Second meeting: September 25

Did CHOICES on computer. Reviewed list of occupations with Mr. Drouin. Confirmed that his most preferred choice was truck driving. Excited by the prospect of driving heavy trucks. His interests, aptitudes (self-assessed) and temperaments would support this choice. Reviewed budget. For short courses, Mr. Drouin would be ok, especially as it would not affect his living expenses to any extent. He would be able to commute from his home to the college daily for courses in Toronto. Family is supportive of this.

## Training Decision:

1. Refer client to two courses, "Straight Truck Driver", a 3 week course for earliest possible date.
2. Arrange for client to have complete driver's medical examination including vision test for Class "D" licence. This is to be returned to me by October 30, 1981.
3. Client is to take night classes to increase his reading and writing skills.
4. Client is to continue in present job until course commencement.
5. Client is to ask present employer for 3 week absence in order to take course. If this is not possible, client will quit present job and search for a new one to be effective at end of course.
6. Immediate referral to "Tractor Trailer Driver" course at Fanshawe College. Client is not likely to meet the requirements at George Brown College but is willing to go to London for 4 weeks. Checked with college and this is OK.
7. For this whole period, must be able to produce a valid driver's "G" licence.
8. Between now and October 31, Mr. Drouin is to approach at least 3 employers about the possibility of work and details after second course.

Oct. 29 – Received results of medical examination. OK

Oct. 30 – Reported that he had talked to Belisle, Ace and J&R Ltd. All would have positions available at end of course.

## Sample 2

**Client:** Lim Bak Thou

**Counsellor:** R. Melchuk

**First Meeting:** September 21, 1981

**Ability in official languages:** Mother tongue is Kampuchean (Cambodian). Completed 6 months of language training in English upon arrival in Canada. Can communicate but is not fluent. Also sponsor group is working with him on his English. Came to Canada in February, 1980.

**Academic Status:** Attended school in Cambodia until age 14 and probably has the equivalent to grade 8. He states that he attended school in the refugee camps whenever it was available. He has had no other training.

**Previous Work Experience:** Minimal. Did odd jobs in the refugee camp including repairing sewing machines and enjoyed that. After completing language training, his sponsor group helped him to get work as a busboy in local restaurant. Has worked at this for eight months. He works a split shift seven days a week and would like to get a job with regular hours in order to spend more time with his young family. Worked on current budget with him. Going on training would make little difference to his income or style of living. Also, he has talked to his original sponsor group and they have agreed to help him if he runs into financial difficulty while on course – on a loan basis with no interest. Wife currently does piece work at home for local company and takes care of children (ages 3 and 18 months) so this is not a problem.

Was anaemic when he arrived in Canada but this has since been taken care of. Report he had prepared by his doctor says that he has no other medical problems. Small size would seem to preclude any work requiring extensive physical strength.

\* Referred to GATB

**Second Meeting:** October 15, 1981

Client is willing to do almost any kind of activity except heavy lifting. Does not want to work outdoors, other conditions are irrelevant. Completed the GATB on October 8, 1981. Results must be interpreted with caution because of language difficulties. However, it appears that he rates at least at level III on most factors and level II on finger dexterity and manual dexterity.

On interest, he repeated that what he likes to do is to use his hands and to make things work. In long run, wants to have his own business. Temperaments estimate supports strong desire to work with things, numbers, and objects and working with machines, processes or techniques. In fact, in these areas he expressed great enthusiasm. He also expressed the intention to continue at night school in order to improve his reading and writing skills.



Work values system appears to be strongly work-oriented and achievement oriented. Is willing to relocate if necessary but says he now has friends in the town and feels accepted. Says it is time to put down roots. The fact that he is one of the few of his ethnic group in the town appears not to bother him.

### **Occupational goal setting:**

Decision was made not to do CHOICES or ICO because of possible language barriers and because of client's stated preference to work with hands, especially at fixing things. Also, member of the sponsor group has small repair shop for engine repairs e.g., skidoos, lawnmowers, outboard motors and is willing to take Mr. Lim in the shop if he receives any training.

### **Training Plan:**

1. Mr. Lim will continue in present job as busboy until course begins.
2. Referral is to be made to the Small Motor repair course given at Keewatin Community College. This is a 3 week course scheduled to begin in one month.
3. Mr. Lim's sponsor group will help to obtain the tools and small machines to work on for this course.
4. Referral is to be made at the same time for a second course, Advanced Small Motor repairs. This is a 25 week course scheduled to begin March 1, 1982.
5. After completion of the first course, Mr. Lim will work as a helper at Northern Skidoo Ltd.
6. Between the two courses, Mr. Lim will take high school subjects in the evening at the local high school and work towards a secondary school diploma.
7. Arrangements will be made with Northern Small Engine Repairs Ltd. for CMITP for training on the job.

### **Requirements for Course 1 - Small Motor Repair**

1. Application form to community college - Done October 15, 1981.
2. Small machine to work on during course - Mr. Lim to obtain with help of sponsor group.

October 15, 1981 - Discussed with J.J. Walker, Co-ordinator of program and he sees no problem with this plan.

### **Requirements for Course 2 - Advanced Small Motor Repairs (25 weeks)**

1. Either grade 9 or small motor repair course. Will meet this by the time of course.
2. Knowledge of English - Mr. Lim's English needs to improve. If he continues as planned, he should have no trouble. Time between courses working as helper should help prepare him for course.

Mr. Walker advises that there are no other requirements but that Mr. Lim should learn the English names for tools before beginning course. Mr. Lim understands this.

## Sample 3

**Client:** Holmes, Janet

**Counsellor:** T. Smith

First Meeting: June 15, 1981

For the last five years, client has taught secondary school English and geography in North York. Will probably be laid off at end of this school year and wants to make plans now. She has been given notice by her board and could be rehired in September but does not like this lack of security. She has a Bachelor of Arts (English), and a Bachelor of Education. Mother tongue is English and has university level courses in French but is not really bilingual. Previous work experience includes summer jobs as waitress, salesclerk. Enjoyed the people contact very much. In teaching, has enjoyed the challenges of working with adolescents, likes getting up in front of the class. Enjoys the academic environment and “being on her toes”. As teacher, her extra-curricular activities included running the drama clubs and being teacher adviser on the school newspaper and yearbook. Has enjoyed this very much and has dreams of someday writing the “Great Canadian Novel”. Job dissatisfiers include lack of security, teacher faculty meetings and mandatory aspects of curricula. Is very articulate and pleasant. Perceives herself as “teacher” and cannot see how she can do anything else without training.

*Leisure time* activities include sports, carpentry and reading.

### **Social and Economic Factors:**

Does not appear to have any social problems. Re finances, has a mortgage on her condominium but no other outstanding bills. Asked her to complete the budget exercise for next meeting.\*

### **Occupational Goals:**

Occupational goal is to be a teacher but does not want to move from present home. Is willing to consider other options but has no idea of what they could be. Some friends have gone into insurance sales and she knows that she would not like that.

Gave her CHOICES Workbook to complete.\*

Second Meeting: June 25, 1981

Has received definite lay-off notice.

Completed budget. If she went on training in this city, she could manage a one year course using her superannuation and savings to help support herself during this period.



Completed CHOICES interaction. Preferred occupations related to journalism, teaching, social work. Has aptitudes for all of them.

- \*Gave her Careers Canada booklets on each of these to read.
- \*Requested her to contact 2 to 3 people involved in journalism and social work and gave her possible contacts.
- \*Asked her to work on professional resumé.

#### Third Meeting: July 9, 1981

Discussed reactions to last meeting. She appears most interested in journalism type occupations. Reviewed possible options including return to university for journalism degree. This does not seem feasible at this time because of need to support herself within the year.

Reviewed course on JOURNALISM AND NEWSWRITING available at Conestoga College, Waterloo. This course is only given at one college and would require her to move for 40 weeks. Asked her to consider the implications.\*

- \*Made arrangements for her to take mandatory pre-test on July 16, 1981.

#### Fourth Meeting: July 16, 1981

Supervised mandatory pre-test. Client says she is willing to move to Kitchener for one year if she knows that she can begin course in September.

#### Telephone Conversation July 22, 1981

Informed client that she had passed test.

#### Fifth Meeting: July 28, 1981

Completed referral to training forms. Reviewed budget with client. She has made arrangement to rent her condominium while she lives in Kitchener. Reviewed resumé and client is aware of how she can update it when she completes course. Checked with college and everything is completed. She can begin course in September. Gave her training information sheet.



## Appendix C

### Information on Course to be Provided to Client

1. Trainee's Name: \_\_\_\_\_  
S.I.N.: \_\_\_\_\_
2. Course Name: \_\_\_\_\_
3. a) Course starts on: \_\_\_\_\_ at \_\_\_\_\_ a.m.  
p.m.  
b) Expected end date of course: \_\_\_\_\_
4. Training Centre: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_
5. On campus report to: \_\_\_\_\_
6. Pick up your first cheque: date \_\_\_\_\_  
place \_\_\_\_\_  
\_\_\_\_\_
7. a) Your weekly training allowance: \_\_\_\_\_  
b) Commuting or living away from home allowance: \_\_\_\_\_  
c) Total weekly allowance: \_\_\_\_\_  
d) Travel grant (if eligible): \_\_\_\_\_
8. Your referring CEC counsellor is: \_\_\_\_\_  
telephone: \_\_\_\_\_
9. While on course, contact: \_\_\_\_\_  
telephone: \_\_\_\_\_
10. If you are ill or unable to attend classes you must contact: \_\_\_\_\_  
telephone: \_\_\_\_\_  
OR \_\_\_\_\_ telephone: \_\_\_\_\_
11. Preparations to make for course: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_





